Oracle® Real-Time Decisions for Siebel Intelligent Offer Generation

Installation and Reference Guide

Version 2.2.1

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Oracle Real-Time Decisions for Siebel Intelligent Offer Generation Installation and Reference Guide, Version 2.2.1

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1 Overview

This guide documents the installation, configuration and administration tasks for the Oracle Real-Time Decisions for Siebel Intelligent Offer Generation product. The product is an integration effort among the Siebel Enterprise Server (Call Center and Marketing applications), the Oracle Real-Time Decisions (RTD) platform, and application logic in both systems to enable intelligent offer generation and retention management. The product is referred to as IOG or IOG application in this document.

IOG uses real-time predictive analytics and dynamic business logic to:

- Predict attrition / churn indicators of a contact or account.
- Predict the optimal retention treatment in case of high attrition / churn risk.
- Predict the optimal cross and up sell offers in lack of high attrition / churn risk.

IOG also enables marketing users to:

- Create and manage marketing offers and retention treatments in Siebel Marketing, and deploy these messages for real-time optimization using the Oracle RTD platform.
- Track drivers of offer response behavior directly through embedded intelligence reports in Siebel Marketing and Call Center.

1.1 Architectural Overview

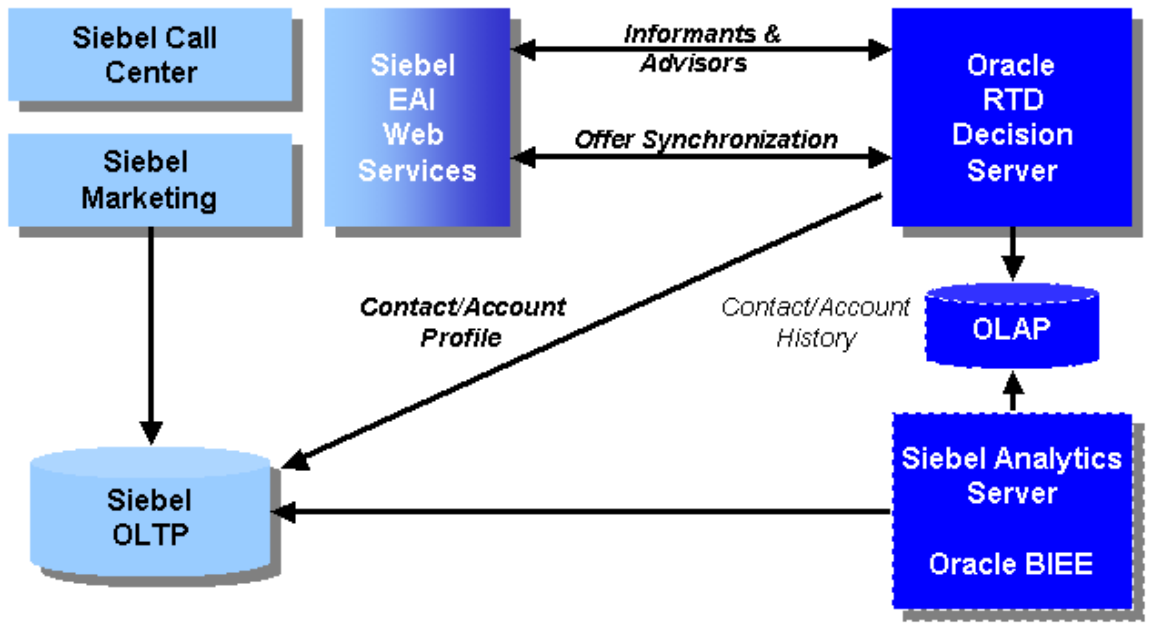

Figure 1. IOG architecture.

Figure 1 shows the high level IOG architecture:

- The Object Manager of Siebel Call Center and Marketing communicates with Oracle RTD platform via two sets of web service requests:
    1. Informants and Advisors – these are Oracle RTD integration points used by Siebel to submit contextual data and request offer recommendations

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from Oracle RTD. For more information about Informant and Advisor integration, please refer to the Oracle RTD platform document *Integration with Oracle RTD Guide*.

2. Offer synchronization – this is used by Siebel Server to push/synchronize offers (treatments) to Oracle RTD in order to make these offers available during offer recommendation requests.

- Oracle RTD uses historical and transactional data from the Siebel OLTP to assist in the offer recommendation process. This data is not stored by the Oracle RTD database (not shown in the figure).

- If Siebel Analytics / Oracle BIEE data is available, it can be utilized as part of the IOG integration via an OLAP JDBC data source.

- Web service requests to Oracle RTD are handled by an Oracle RTD Inline Service, which contains metadata specific to the IOG use-cases, and consists of informants and advisors logic, and definitions of models, rules, data sources, decisions, among other RTD application objects. Oracle RTD Inline Services operate on top of the Oracle RTD platform.

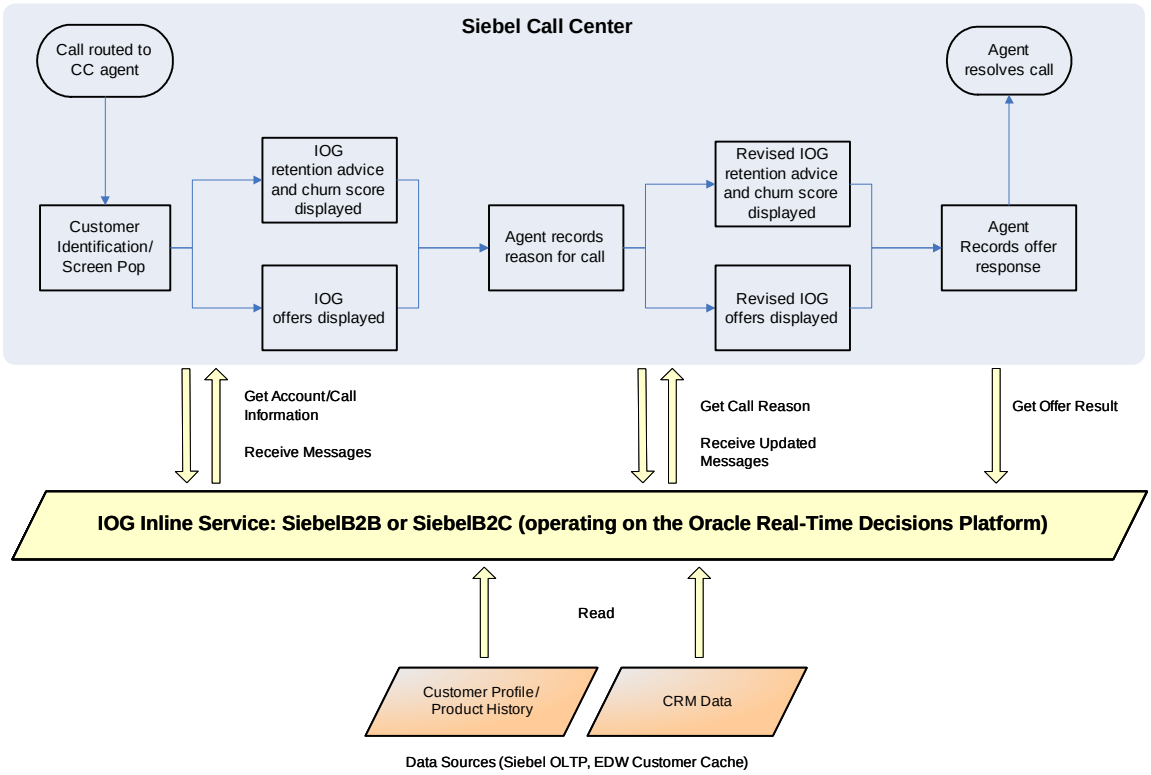

Figure 2. IOG incorporated into business workflow.

Figure 2 shows IOG incorporated into the Siebel Call Center workflow. In the Account or Contact view, after the customer is identified, web service calls are made to Oracle RTD to first submit contextual information about the customer and then to request offers and other information, i.e. churn score of the customer. Optionally, the call center agent may record reasons for the call or other activities, which then triggers additional web service

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calls to Oracle RTD in order to update the offers displayed. Finally, the agent records the response to the offers displayed which triggers a final web service call to Oracle RTD, in order to close the loop.

1.2 IOG installation and configuration

The installation and configuration of IOG consists of two components:

- Configuration of the IOG Inline Service on an Oracle RTD platform, and
- Configuration of a Siebel Enterprise Server to enable IOG features

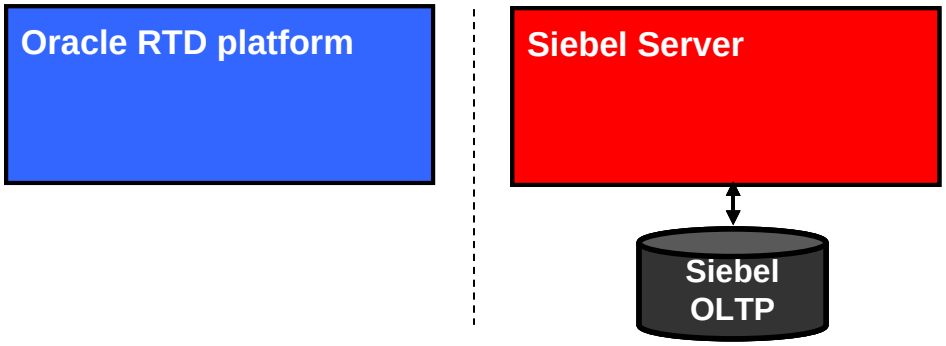

Figure 3. Oracle RTD platform and Siebel Enterprise Server before IOG is configured

In Figure 3, an Oracle RTD platform and a Siebel Enterprise Server are shown as separate entities. Before installing IOG, make sure both server systems are installed and operational. For instructions on installing Oracle RTD platform or Siebel Enterprise Server, see their respective documentation.

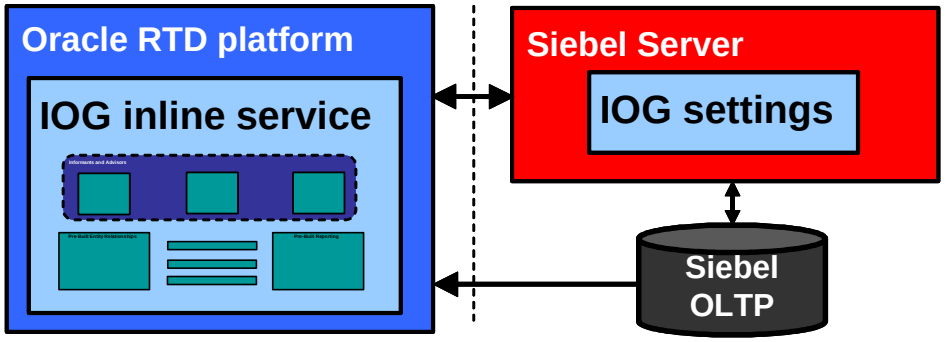

Figure 4. Oracle RTD platform and Siebel Enterprise Server after IOG is configured.

In Figure 4, IOG has been enabled by 1) installing the IOG Inline Service on the Oracle RTD platform, and 2) configuring IOG settings in the Siebel Enterprise Server. Instructions for these two components are given in different chapters, as described in the following table.

Oracle RTD platform version	Siebel Enterprise Server version	IOG configuration in Oracle RTD platform	IOG configuration in Siebel Enterprise Server
2.2 or 2.2.1	7.8	Chapter 2. Configuring IOG Inline Service in Oracle RTD Platform	Chapter 3. Configuring IOG in Siebel Enterprise Server 7.8

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2.2 or 2.2.1	8.0	Chapter 2. Configuring IOG Inline Service in Oracle RTD Platform	Chapter 4. Configuring IOG in Siebel Enterprise Server 8.0
2.2 or 2.2.1	8.1	Chapter 2. Configuring IOG Inline Service in Oracle RTD Platform	Chapter 5. Configuring IOG in Siebel Enterprise Server 8.1

Note: Siebel Object Manager Authentication is not supported in Oracle RTD platform version 2.2.1.

1.3 Inbound Offer Management

After IOG has been installed and configured, marketing user can:

- Create and manage marketing offers and retention treatments in Siebel Marketing, and deploy these messages for real-time optimization using the Oracle RTD platform.
- Track drivers of offer response behavior directly through embedded intelligence reports in Siebel Marketing and Call Center.

These topics are discussed in detail in chapter *6 - Inbound Offer Management for Siebel Marketing and Oracle RTD*.

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2 Configuring IOG Inline Service in Oracle RTD Platform

2.1 Install and configure the Oracle RTD Server

As prerequisites, you must have installed one of the Oracle RTD supported J2EE application servers, and you must have successfully deployed the Oracle RTD server on to this application server. Before starting the installation, verify that Oracle RTD is running and that the server logs do not contain any errors.

For information on installing the Oracle RTD Server, please refer to the Oracle RTD platform document *Installation and Administration of Oracle RTD*, available at http://www.oracle.com/technology/documentation/rtd.html.

This chapter describes how to set up the Oracle RTD-specific portion of the overall IOG application. Unless otherwise stated, the instructions given in this chapter are valid for Oracle RTD platform versions 2.2 and 2.2.1. See the following chapters for details on setting up the Siebel Enterprise Server-specific portion of IOG:

- Chapter 3 - *Configuring IOG in Siebel Enterprise Server 7.8*.
- Chapter 4 - *Configuring IOG in Siebel Enterprise Server 8.0*.
- Chapter 5 - *Configuring IOG in Siebel Enterprise Server 8.1*.

2.2 Overview

Configuring the IOG Inline Service in the Oracle RTD platform consists of the following tasks:

- 2.3 - Configuring JDBC Data Sources
- 2.4 - Creating the Entity Views in the Siebel OLTP database
- 2.5 - Setting up Oracle RTD server Authentication
- 2.6 - Specifying the list of trusted hosts for Decision Service requests
- 2.7 - Deploying the Siebel IOG Inline Service to the Oracle RTD Server
- 2.8 - Testing the Deployed Inline Service via Web Service Calls

2.3 Configuring JDBC Data Sources

Oracle RTD Server uses Java Database Connectivity (JDBC) to access contact and account profile information in the Siebel OLTP and OLAP databases. To run the IOG application for Siebel Call Center, you must use an Online Transaction Processing (OLTP) data source.

The Online Analytical Processing (OLAP) data source is needed only if you use Siebel Analytics / Oracle Business Intelligence Server. For instructions on setting up the OLAP data source, see chapter *7.2 - Utilizing analytics data via OLAP tables*.

The following JDBC data sources are required to run the application:

Data Source name	Type	Description
SDDS	System	Stores the deployed projects, run-time sessions, and model learnings.

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		This data source is required. Typically, this data source is created when you install the Oracle RTD Server.
SIEBEL_OLTP	Source	Populates the customer, account, and asset entities from the Siebel OLTP. This data source is required.
SIEBEL_OLAP	Source	Uses prepopulated OLAP tables to populate the service request, order history, and financial account entities. This data source is required only if you use Siebel Analytics / Oracle Business Intelligence Server.

The **SDDS** JDBC data source should have already been configured as part of the Oracle RTD platform setup. To create the **SIEBEL_OLTP** data source in the application server and RTD resource references to it, refer to the Oracle RTD platform document *Installation and Administration of Oracle RTD*, with section numbers as specified by the following table.

Application server	Section #	Notes
Oracle AS 10.1.3	Section 7.1	In section 7.1.2, steps 11a and 11b: set the data source and JNDI names to **SIEBEL_OLTP**
IBM WebSphere 6.1	Section 7.2	In section 7.2.1, steps 13b and 13c: set the data source and JNDI names to **SIEBEL_OLTP**
BEA WebLogic 9.2	Section 7.3	In section 7.3.2, steps 4a and 4b: set the data source and JNDI names to **SIEBEL_OLTP**

Restart the application server after the SIEBEL_OLTP JDBC data source has been added.

2.4 Creating the Entity Views in the Siebel OLTP database

At runtime, Oracle RTD Server accesses views defined in the SIEBEL_OLTP database to populate the entities in the SiebelB2C or SiebelB2B inline services. The login script that executes the Data Definition Language (DDL) statements to create the views must have CREATE VIEW privileges in the database. Only create the views for the inline service that you want to install. For example, if you want to install a B2B inline service, include only B2B views. The following table shows the names and functions of the three views for each application type.

Vertical	View Name	Description
B2B	*RTD_CME_ACCOUNT*	Represents the wireless customer. Corresponds to the *Account* entity. Contains attributes demographic and geographic profile information.
	RTD_CME_ASSETS	Represents the plans, devices and options associated to an account. Corresponds to the *Assets* entity.
	RTD_CME_AGENT	Represents the call center agent who answers the call. Corresponds to the *Contextual Call Agent* entity. Contains attributes such as the agent tenure and skill set.
B2C	*RTD_FINS_CONTACT*	Represents the customer. Used to fill the *Customer* entity. Contains attributes such as Profile, Credit Score, Investment Experience, and Annual Income.
	RTD_FINS_ASSET	Represents the financial account held by a customer. Used to fill the *Financial Accounts* entity.

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	RTD_FINS_AGENT	Represents the call center agent who answers the call. Corresponds to the *Contextual Call Agent* entity. Contains attributes such as the agent tenure and skill set.

To create the view, follow these steps:

1) Open the text file which contains the statements that create views specific to your OLTP database type and Siebel Enterprise application type. The file can be found in the Oracle RTD Applications directory

   \software\Oracle Real-Time Decisions for Siebel Intelligent Offer Generation\

   with filename as shown in the following table:

Application Type	Siebel Vertical	Filename
B2B	Siebel Business Applications	\<*SiebelVer*>\B2B\SQL_HOR_ORACLE.txt \<*SiebelVer*>\B2B\SQL_HOR_MSSQL.txt \<*SiebelVer*>\B2B\SQL_HOR_DB2.txt
B2B	Siebel Industry Applications	\<*SiebelVer*>\B2B\SQL_SIA_ORACLE.txt \<*SiebelVer*>\B2B\SQL_SIA_ MSSQL.txt \<*SiebelVer*>\B2B\SQL_SIA_ DB2.txt
B2C	Siebel Business Applications	\<*SiebelVer*>\B2C\SQL_HOR_ORACLE.txt \<*SiebelVer*>\B2C\SQL_HOR_ MSSQL.txt \<*SiebelVer*>\B2C\SQL_HOR_ DB2.txt
B2C	Siebel Industry Applications	\<*SiebelVer*>\B2C\SQL_SIA_ORACLE.txt \<*SiebelVer*>\B2C\SQL_SIA_ MSSQL.txt \<*SiebelVer*>\B2C\SQL_SIA_ DB2.txt

where <*SiebelVer*> is the Siebel Enterprise Server version, that is, Siebel7.8, Siebel8.0, or Siebel8.1.

2) Find the CREATE VIEW statement in the text file for the view that you want to create.
3) Execute the CREATE VIEW statement on your database.
4) Test that the CREATE VIEW statement worked correctly. For example, execute a statement similar to the following:

   SELECT * FROM RTD_FINS_CONTACT

   Make sure that you replace RTD_ FINS _CONTACT with the correct view name.

5) Repeat Step 2 to Step 4 for each view that you want to create.

2.5 Setting up Oracle RTD server Authentication

There are three options for Oracle RTD server authentication: Windows, Platform, and Siebel Object Manager. This section describes the steps necessary to set up Platform or Siebel Object Manager authentication.

For Platform authentication, you must create groups and users which will be stored in the Oracle RTD database. For Siebel Object Manager authentication, the users and

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groups (responsibilities) are created in and reside on the Siebel Enterprise Server, and are configured with appropriate permissions within Oracle RTD server.

After you have configured an Oracle RTD authentication method, update the Symbolic URLs for username and password within Siebel.

2.5.1 Setting up Oracle RTD Platform (DB) Authentication

Configuring Oracle RTD Platform authentication consists of:

1) Changing the authentication provider class to DBAuthenticator.
2) Creating groups and users.
3) Assigning Oracle RTD realm permissions (numeric values of 0 to 6) to these groups.
4) Enabling authentication.

Follow the instructions in sections 6.3 and 6.5 of the Oracle RTD platform document *Installation and Administration of Oracle RTD*.

2.5.2 Setting up Siebel Object Manager Authentication

Note: Siebel Object Manager Authentication is not supported with Oracle RTD Platform Version 2.2.1. For IOG implementations using Oracle RTD server 2.2.1, the Oracle RTD platform authentication must be used.

Oracle RTD server is able to authenticate and authorize using the security adapters configured in the Siebel Object Manager. When authenticating a new user, Oracle RTD attempts a login to a specified Siebel Object Manager. If successfully authenticated, Oracle RTD accesses the Responsibility business component to determine the authorization groups. These groups correspond to the groups managed in the Oracle RTD server.

Configuring Siebel Object Manager authentication consists of:

1) Changing the authentication provider class to SiebelAuthenticator.
2) Assigning Oracle RTD realm permissions (numeric values of 0 to 6) to existing Siebel responsibilities and/or users.
3) Enabling authentication.

Follow the instructions in sections 6.4 and 6.5 of the Oracle RTD platform document *Installation and Administration of Oracle RTD*.

In section 6.4.2, step 8 of the Oracle RTD platform document *Installation and Administration of Oracle RTD*, the format of the Siebel Object Manager string (SiebelConnectString) should be as follows:

For Siebel Enterprise Server 7.8:

```
siebel[[. transport][.[ encryption]
[.[ compression]]]]://host[:port]/EnterpriseServer/AppObjMgr
```

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Here are example Siebel Object Manager connection strings, the Siebel Enterprise Server parameter corresponds to the name of the machine on which the server is running and in this case it is sdchs22n060:

Vertical	Version	Connect String
SiebelB2C	7.8.x	siebel.TCPIP.None.None://sdchs22n060:2321/siebel/FINSObjMgr_enu
SiebelB2B	7.8.x	siebel.TCPIP.None.None://sdchs22n060:2321/siebel/eCommunicationsObjMgr_enu

See the Siebel 8.0 or 8.1 Bookshelf for connect string formats if you are implementing IOG with Siebel 8.0 or 8.1.

Configuring access to the Siebel OM JAR files within the J2EE application server.

For OC4J, read the Oracle RTD platform document *Installation and Administration of Oracle RTD*, section 6.4.1.1.

For WebSphere, read the Oracle RTD platform document *Installation and Administration of Oracle RTD*, section 6.4.1.2.

For WebLogic, read the Oracle RTD platform document *Installation and Administration of Oracle RTD*, section 6.4.1.3.

To test that you have setup Siebel Object Manager, access the standalone Oracle RTD Decision Center UI, and verify that you can log in using a Siebel user name and password.

2.6 Specifying the list of trusted hosts for Decision Service requests

If both the Siebel Enterprise Server and the Oracle RTD server are installed on the same physical machine, this section can be bypassed. If the servers reside on different machines (or belong under different IP addresses), the IP address of the Siebel Enterprise Server must be added to a list of trusted hosts for (Oracle RTD) Decision Service requests.

Similarly, if Oracle RTD Decision Studio (or Oracle RTD Load Generator) is located on a different machine from that of the Oracle RTD Server, and you want to send sample requests using the Test View in Decision Studio, then the IP address of the machine that hosts Decision Studio and/or Load Generator must also be added to the list of trusted hosts. The list is stored within the Oracle RTD server and maintained through Oracle RTD's JMX administration console (JConsole), as described next.

To specify a list of trusted hosts for Oracle RTD Decision Service requests:

1) If you are using OC4J or WebLogic, open JConsole by running *JAVA_HOME*`/bin/jconsole.exe`. If you are using WebSphere, run the batch script you created during JConsole configuration. See the Oracle RTD platform document *Installation and Administration of Oracle RTD* for more information about accessing JConsole.
2) Click the **Remote** tab. Then, enter the appropriate port number (typically `12345`) and the administrator credentials you created during installation and click **Connect**.

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3) Click the **MBean** tab, then navigate to the **OracleRTD > SDClusterPropertyManager > Cluster** MBean and ensure the **RestrictDSClients** attribute is set to `true`. This attribute ensures that the Decision Service only accepts requests from its own host, or from the list of hosts identified in the **TrustedDSClients** attribute.
4) In the **OracleRTD > SDClusterPropertyManager > Cluster** MBean, update the **TrustedDSClients** attribute to include a semicolon-separated list of IP addresses of the hosts from which you want Decision Service to accept requests. You must specify IP addresses; do not specify host names.

2.7 Deploying the Siebel IOG Inline Service to the Oracle RTD Server

2.7.1 Importing a Siebel IOG Inline Service into Oracle RTD Decision Studio

There are two IOG Inline Services for each of the Siebel Enterprise Server versions: SiebelB2B and SiebelB2C. The Inline Services are packaged in zip files which contain XML and Java files organized in a directory structure. To load, view, and edit the Inline Service, use the Oracle RTD client tool Decision Studio.

To set up the IOG Inline Service, you must import the Inline Service project into Decision Studio, as follows:

1) Create a directory for your Inline Services, for example, C:\RTD_ILS.

   This directory will be referred to as *RTD_ILS_HOME* in this documentation.
2) From the Oracle RTD Applications media pack directory,

   \software\Oracle Real-Time Decisions for Siebel Intelligent Offer Generation\

   choose the Siebel Enterprise Server version (Siebel7.8, Siebel8.0, or Siebel8.1), the application type (B2B or B2C), and unzip the application zip file, `SiebelB2B.zip` or `SiebelB2C.zip` into *RTD_ILS_HOME*.

   This creates the directory SiebelB2B or SiebelB2C under *RTD_ILS_HOME*.
3) In Decision Studio, select File > Import.
4) From the Import window, select **Existing Projects into Workspace**.
5) If not already visible in the Projects area of the Import Projects dialog box, click the Browse button, and locate SiebelB2B or SiebelB2C under *RTD_ILS_HOME*, for example C:\RTD_ILS\SiebelB2B.
6) Select the directory SiebelB2B or SiebelB2C in the file dialog box and click Ok.
7) Confirm that the SiebelB2B or SiebelB2C Inline Service project name appears in the project window and is checked True.
8) Click the Finish button to load the project into Decision Studio.
9) Click Finish. After the project/Inline Service is imported, Decision Studio displays a complete application tree in the left pane, including Entities, Decisions, Data Sources, etc. similar to what is shown in the following screenshot.

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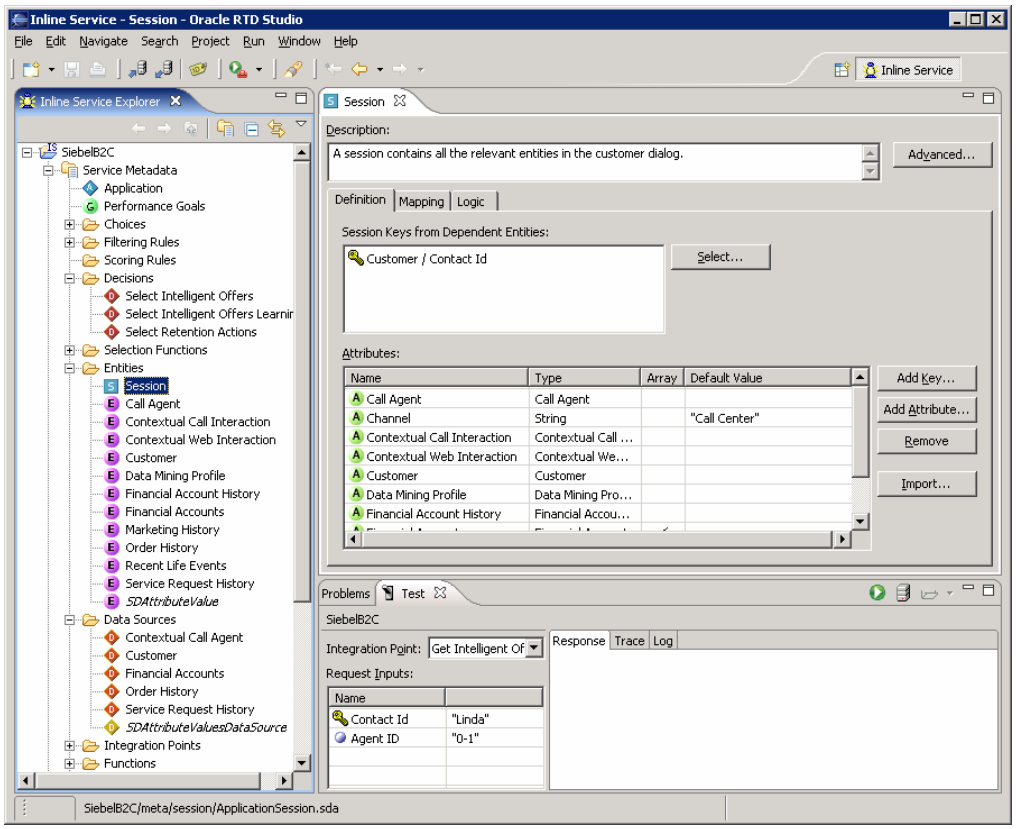

The Inline Service should now be successfully loaded into Oracle RTD Decision Studio.

2.7.2 Verifying OLTP data source is accessible by Oracle RTD

The next step is to verify that the SIEBEL_OLTP data source is accessible by the Oracle RTD server. This verifies that you have setup the Oracle RTD data source properly as described in *2.3 Configuring JDBC Data Sources*.

1) Expand the data sources folder and double click on Customer if your inline service is SiebelB2C and Account if your inline service is SiebelB2B, and then click **Import**.
2) Select the running Oracle RTD server and click Next. If the SIEBEL_OLTP JDBC data source was configured correctly, the application displays a list of tables and views with the correct view highlighted for the current data source as shown below:

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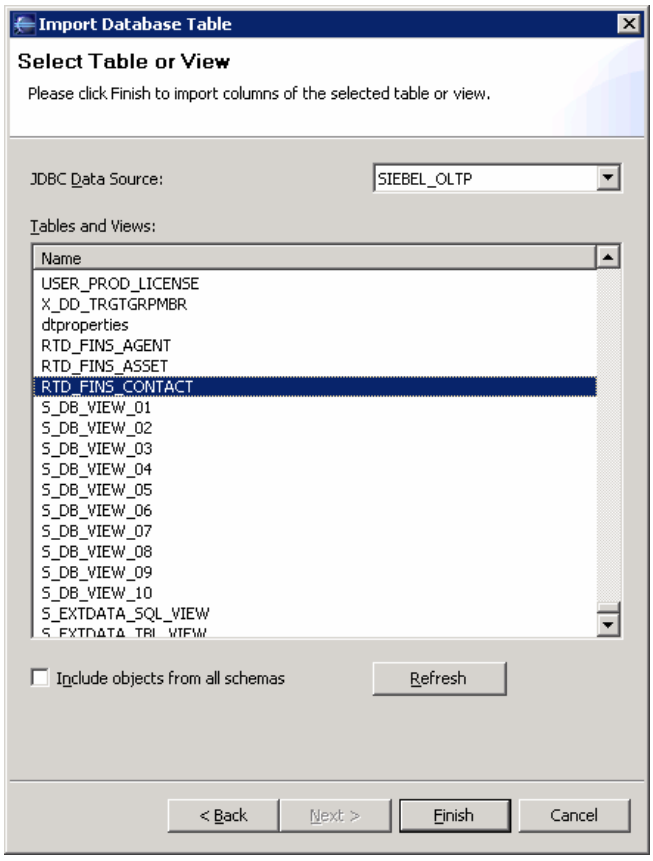

3) If you get an error message instead, then double check the JDBC data source configuration as described in *2.3 Configuring JDBC Data Sources*. If you see the list of tables and views properly, click the 'Cancel' button since there is no need to re-import the data source.

2.7.3 Deploying IOG Inline Service to Oracle RTD server

The SiebelB2C or SiebelB2B Inline Service is now ready to be deployed to the Oracle RTD server. Click Deploy, , located in the toolbar. The following dialog appears:

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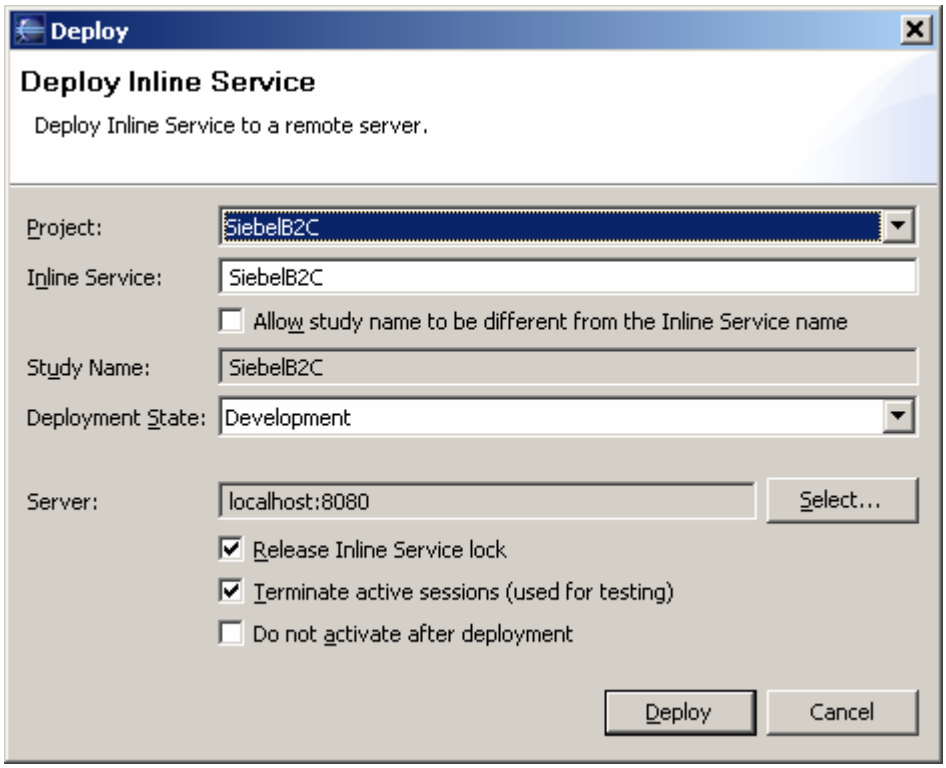

Be sure that the correct SiebelB2C or SiebelB2B project is selected in the project dropdown. The deployment state should be set to Development. Click "Deploy" and if the Inline Service is successfully deployed, a "SiebelB2C deployed successfully" message will be displayed in the bottom status bar.

Before the Oracle RTD server can accept requests, the list of trusted hosts needs to be updated to include IP addresses where requests will originate. The instructions are given in the next section.

2.8 Testing the Deployed Inline Service via Web Service Calls

When the data source connectivity has been verified, and the Inline Service has been deployed, the next step is to do a dry run of the application using the Oracle RTD Decision Studio's built in Test View. To test the **Identify Customer** informant:

1) Navigate to the Test tab on the lower quadrant of Decision Studio. If this tab is hidden, from the Decision Studio's main menu, select `Window > Show View > Test` to expose it.

2) Pick **Identify Customer** from the Integration Point dropdown.
   If you deployed SiebelB2C, then set:

   contactId = Linda
   agentId = 0-1
   channel = web

   If you deployed SiebelB2B, then set:

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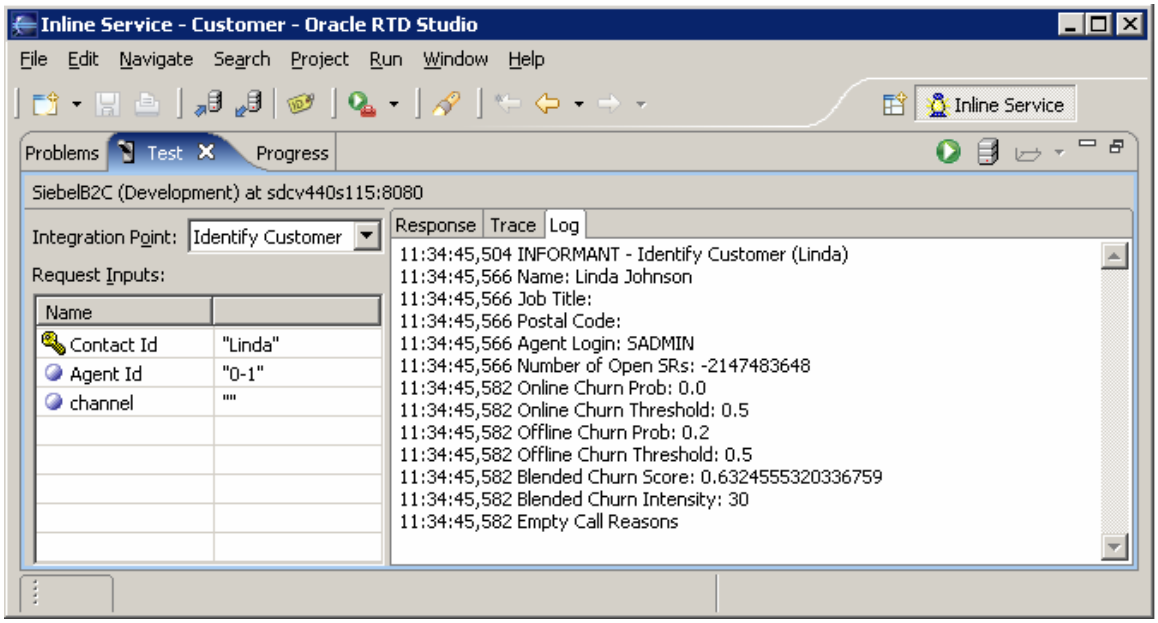
accountId = Shirley
agentId = 0-1
channel = web

3) Click the button and a web services call is made to the Oracle RTD Server. The Log tab displays the output results. Verify that output is similar to the following example.



If the test fails, examine the exception stack trace from either the server command window (if one exists), or the Oracle RTD server.log file. This log contains information useful in debugging the problem. For typical locations of the Oracle RTD server.log file, see section 6.1.2 of the Oracle RTD platform document *Installation and Administration of Oracle RTD*.

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3 Configuring IOG in Siebel Enterprise Server 7.8

3.1 Environment

The Oracle RTD for Siebel Intelligent Offer Generation application can be installed with Siebel 7.8 Call Center for Horizontal (HOR) and Siebel Industry Applications (SIA). This chapter assumes that your installation environment already includes the following installed components:

- Siebel Gateway Server v7.8.x
- Siebel Enterprise Server(s) v7.8.x
- Siebel Transaction Database (OLTP) v7.8.x
- Siebel Tools v7.8.x
- Oracle RTD Server, see chapter *2 - Configuring IOG Inline Service in Oracle RTD Platform*.
- Siebel Analytics Server and Web Server v7.5.x / v7.7.1 / v7.8.x (optional)
- Oracle Business Intelligence Server (BIEE) v10.1.3.x (optional)

The use of Siebel Analytics or Oracle BIEE as a data source is optional. For information on installation of Siebel applications and Siebel Analytics, please refer to the Siebel Bookshelf documentation. For information on installation of Oracle BIEE, please refer to the Oracle BIEE documentation.

3.2 Installation Overview

The installation comprises two main parts. The first part installs core IOG integration services, including Web Services for real-time integration and offer synchronization capabilities. The second part installs the B2C or B2B specific customer dashboard view, featuring two applets that expose real-time decisions to call center agents: Intelligent Offers and Retention Actions. If the customer dashboard of Siebel Call Center is based on the Contact business component (such as in Financial Services), then the B2C install files should be used. If the customer dashboard is based on the Account business component (such as in Communications), then the B2B install files should be used. The core IOG integration services can be leveraged, independent of the vertical-specific dashboard view, to create custom integration views in Siebel Call Center that expose real-time decisions.

The following files are needed for the installation. These files are on the Oracle RTD Applications DVD, in the directory \software\Oracle Real-Time Decisions for Siebel Intelligent Offer Generation\.

File Name	Description
CORE	
\Siebel7.8\CORE\CORE_HOR_SiebelRTD.sif	Horizontal Repository changes, including core Web Services & Offer Sync capabilities and SSO views, for Siebel repository (Siebel.srf)
\Siebel7.8\CORE\CORE_SIA_SiebelRTD.sif	SIA Repository changes, including core Web Services & Offer Sync capabilities and SSO views, for Siebel repository (Siebel.srf)

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\Siebel7.8\CORE\CORE_ExternalChoiceService.XML	Web Service for Offer Synchronization
\Siebel7.8\CORE\CORE_DecisionService.xml	Web Service for Informants and Advisors
\Siebel7.8\CORE\CORE_SeedData.dat	Data file with required seed data
Business to Consumer (i.e. for FINS)	
\Siebel7.8\B2C\B2C_HOR_SiebelRTD.sif	Horizontal Repository changes, including customer dashboard UI, for the Siebel repository (siebel.srf)
\Siebel7.8\B2C\B2C_SIA_SiebelRTD.sif	SIA Repository changes, including customer dashboard UI, for the Siebel repository (siebel.srf)
\Siebel7.8\B2C\B2C_Comm_Config.def	Communication events
\Siebel7.8\B2C\B2C_SeedData.dat	Data file with required seed data
\Siebel7.8\B2C\SiebelB2C.zip	IOG Inline Service for B2C Industry
\Siebel7.8\B2C\SQL_HOR_DB2.txt	OLTP View statements for IBM DB2
\Siebel7.8\B2C\SQL_HOR_MSSQL.txt	OLTP View statements for MS SQL Server
\Siebel7.8\B2C\SQL_HOR_ORACLE.txt	OLTP View statements for Oracle
Business to Business (i.e. for CME)	
\Siebel7.8\B2B\B2B_HOR_SiebelRTD.sif	Horizontal Repository changes, including account dashboard UI, for the Siebel repository (siebel.srf)
\Siebel7.8\B2B\B2B_SIA_SiebelRTD.sif	SIA Repository changes, including account dashboard UI, for the Siebel repository (siebel.srf)
\Siebel7.8\B2B\B2B_Comm_Config.def	Communication events
\Siebel7.8\B2B\B2B_SeedData.dat	Data file with required seed data
\Siebel7.8\B2B\SiebelB2B.zip	IOG Inline Service for B2B Industry
\Siebel7.8\B2B\SQL_HOR_DB2.txt	OLTP View statements for IBM DB2
\Siebel7.8\B2B\SQL_HOR_MSSQL.txt	OLTP View statements for MS SQL Server
\Siebel7.8\B2B\SQL_HOR_ORACLE.txt	OLTP View statements for Oracle

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3.3 Installation of Core IOG Services on Siebel Enterprise Server 7.8

3.3.1 Overview

The core IOG services must be installed prior to installing the industry-specific application. Installation of the core IOG services includes the following high-level tasks:

1) Importing a .sif file containing the repository changes. This file includes:
    a. Web Services support for Informant and Advisor integration with Oracle RTD
    b. Web Services support for Offer Synchronization with Oracle RTD
    c. Data model changes for extension columns
    d. User interface changes for new views, new and modified applets, and new fields and columns

2) Adding new seed data to support the core IOG services, including:
    a. Host and Symbolic URL information for displaying Decision Center and Decision Center reports in the integrated user-interface
    b. New Views for RTD Offer reports & Dashboards
    c. New LOVs for offer synchronization
    d. Runtime Events seed data to call Informants
    e. Communication events to call Informants

After importing the .sif file, the administrator must compile a new Siebel Repository file (.srf file). Prior to beginning this work, review the Siebel 7.8 bookshelf book *Siebel Tools Reference Guide* (chapter 17 – Repositories).

3.3.2 Pre-Installation Tasks

Before importing the .sif file:

- Backup your existing Siebel Repository file (.srf)
- Backup your existing Siebel OLTP database (in your development environment)
- Shut down the Siebel Enterprise Server on which you will be compiling the repository changes

3.3.3 Import of Repository Changes

To import the .sif file of repository changes:

1) Stop the Siebel Enterprise Server.
2) Log into Siebel Tools connected to the Server database.
3) In the Object Explorer pane on the left hand side, select the Project node.
4) Create new Project called “RTD Integration” (if one doesn’t already exist).
5) Lock the following projects:
    - Project ‘Offer (DBM)’
    - Project ‘SME Campaign Management’

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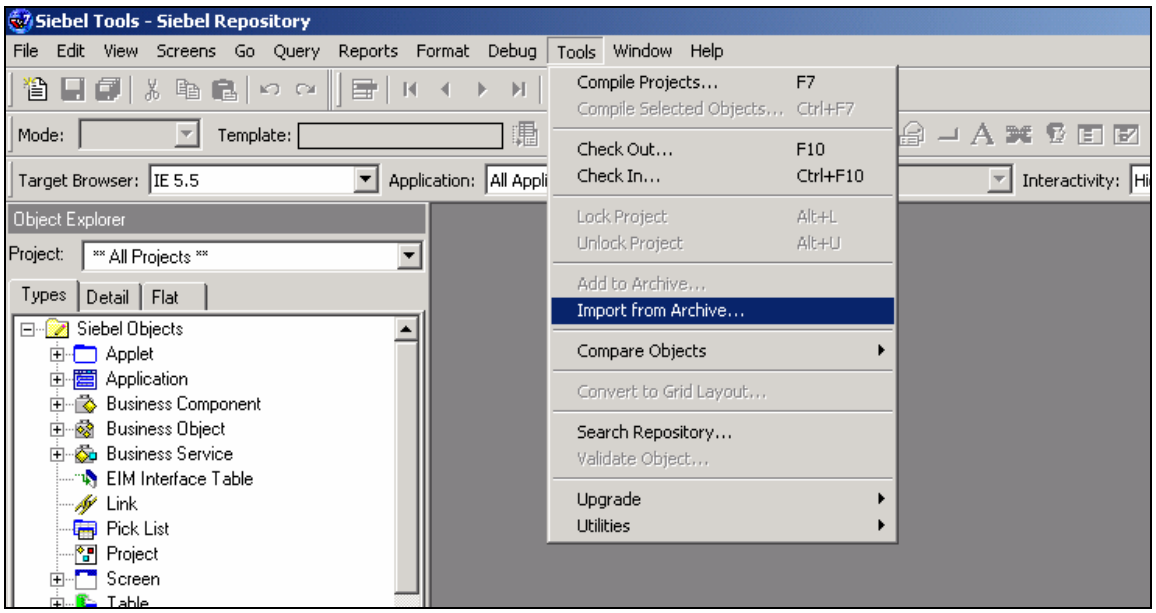
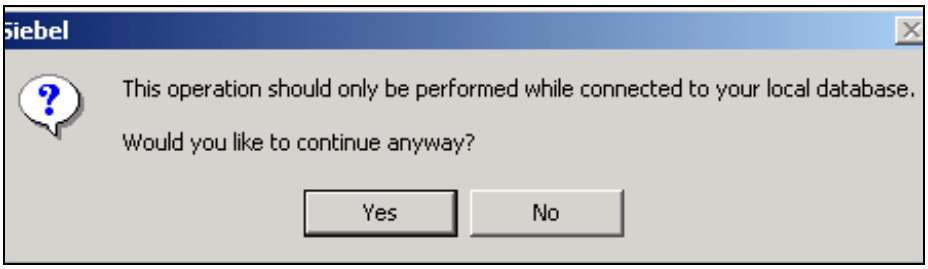
- Project ‘eMarketing’
- Project ‘Table Marketing’
- Project ‘RTD Integration’

6) Choose Tools > Import from Archive.



7) The following dialog appears.



Click Yes.

8) In the Select Archive to Import dialog, browse for file *CORE_HOR_SiebelRTD.sif (*Note: If you are deploying IOG application on verticals environment, use *CORE_SIA_SiebelRTD.sif* file for import) and click Open. See section *3.2-Installation Overview* for location of the .sif files.

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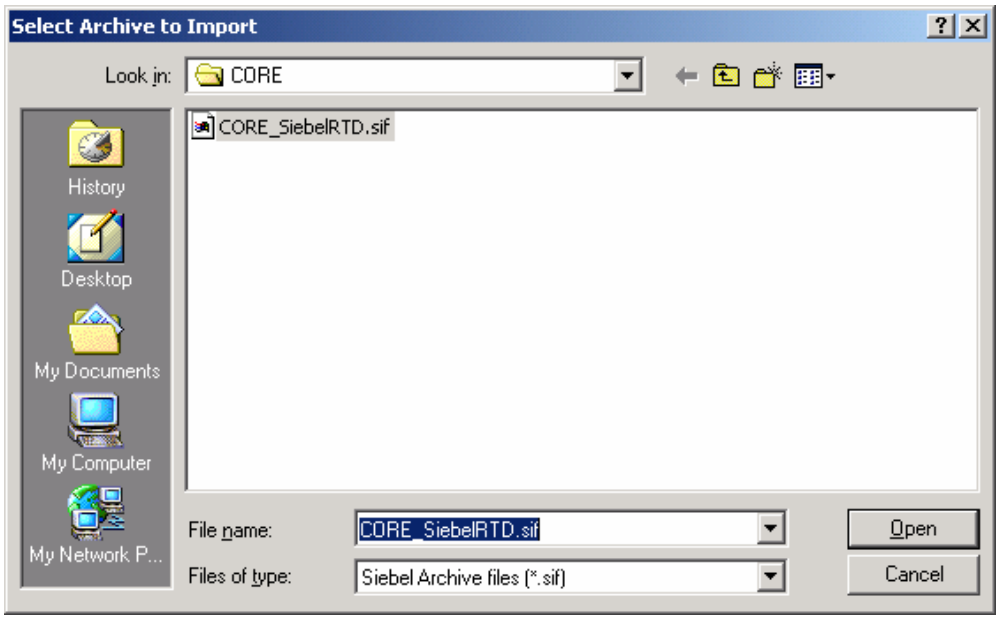
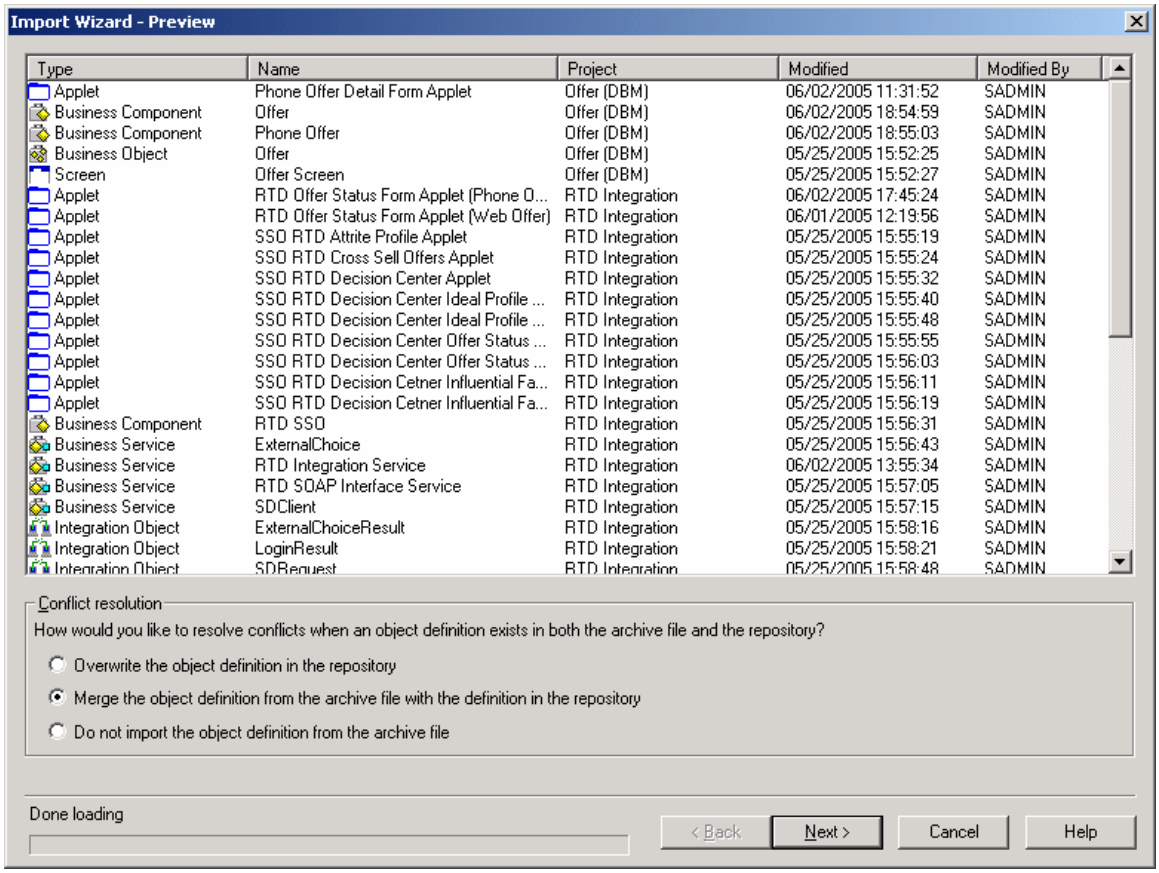


9) In the Import Wizard – Preview dialog, in the Conflict Resolution area, check *Merge the object definition from the archive file with the definition in the repository*. (This is the default option displayed in the Conflict Resolution section).



Click Next.

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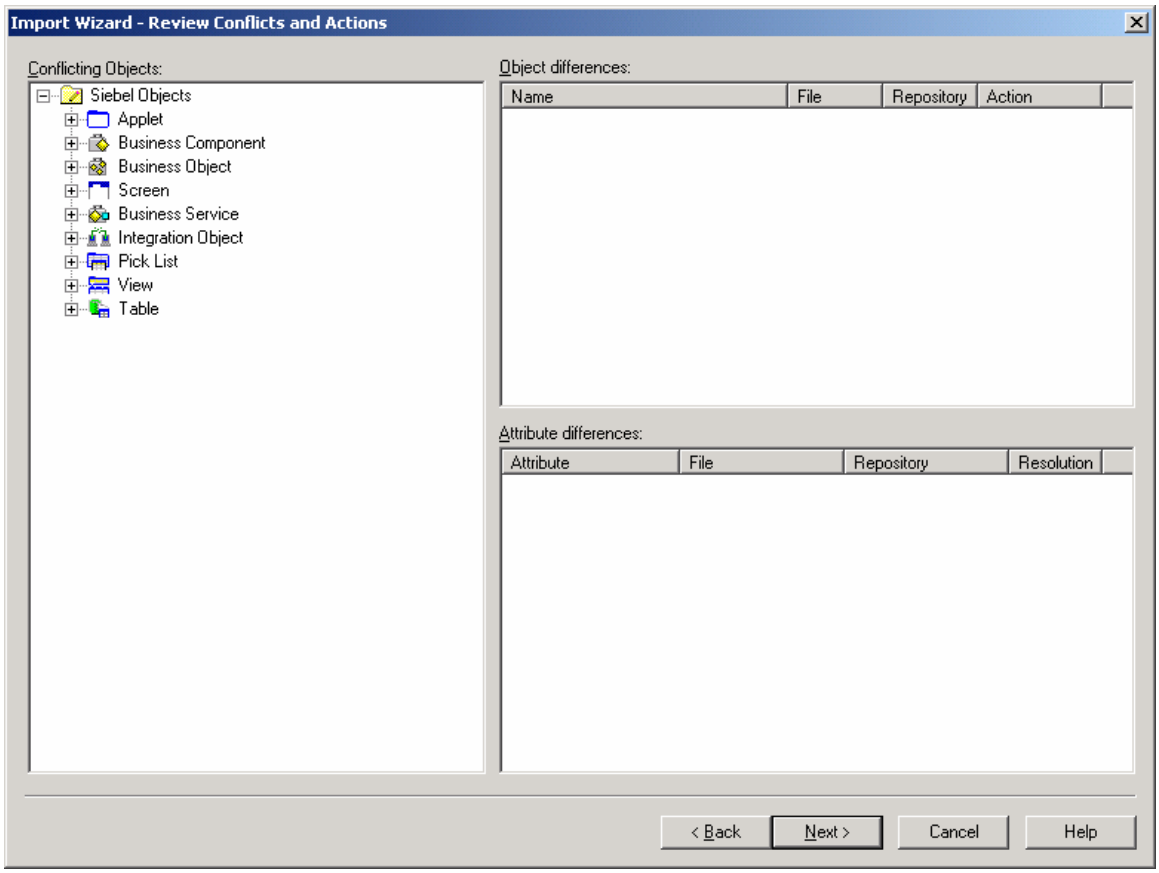
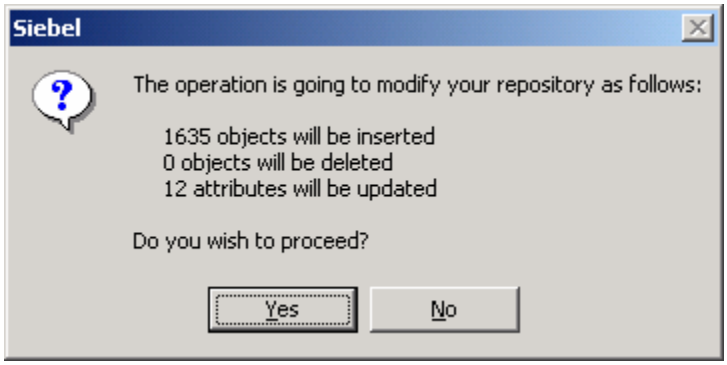
10) The Import Wizard compares the object differences between the .sif file and the repository. When the comparison completes you can use the dialog as shown in the following screenshot to review the changes to be made.



To accept the changes and continue, click Next.

11) The following dialog appears.



To confirm that you agree to the changes, click Yes.

Note: The number of objects inserted, deleted, or updated could be different based on environmental differences and custom configuration.

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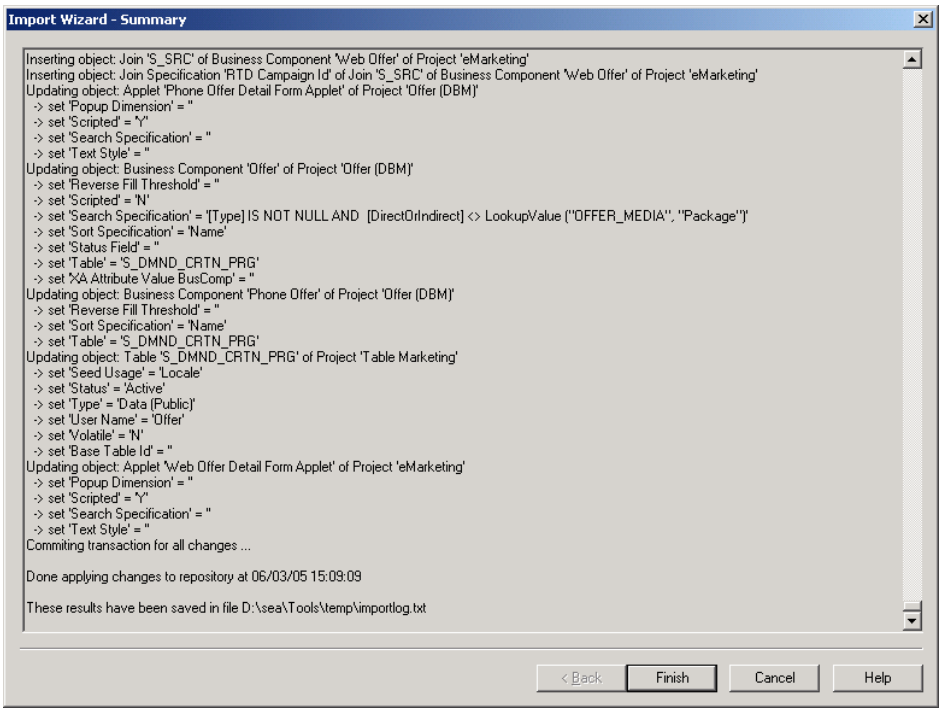
12) The Import Wizard merges the repositories. This typically takes a few minutes to complete. As the merge is performed, the changes are logged to the dialog box. When the merge is completed, click Finish.



Optionally, you can backup the log file shown at the end of the merge dialog for future reference.

13) Confirm that Siebel Tools is set to the correct language that you wish to compile. In Siebel Tools, choose View > Options. Click the 'Language Settings' tab and set to the desired language.

14) Confirm that Siebel Tools is pointing to the desired Browser Script folder. In Siebel tools, choose View > Options. Open the Scripting tab and specify a folder location for the "Browser script compilation folder" (e.g. *c:\sea\eAppWeb\Public\enu* for location on the Web Server OR *c:\sea\client\Public\enu* for mobile Web Client on local machine)

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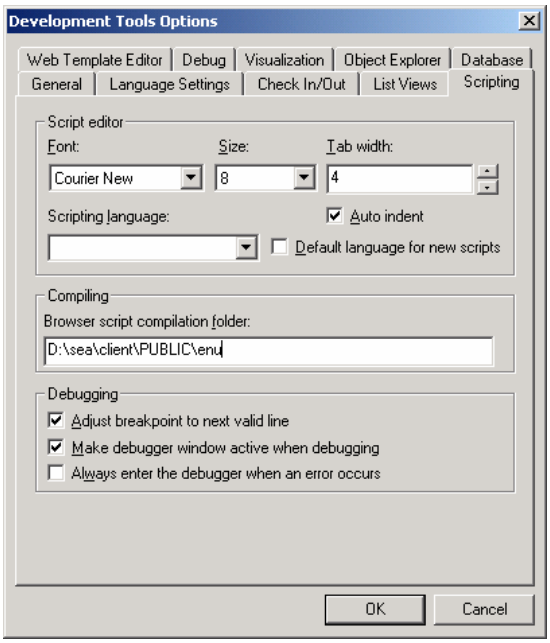
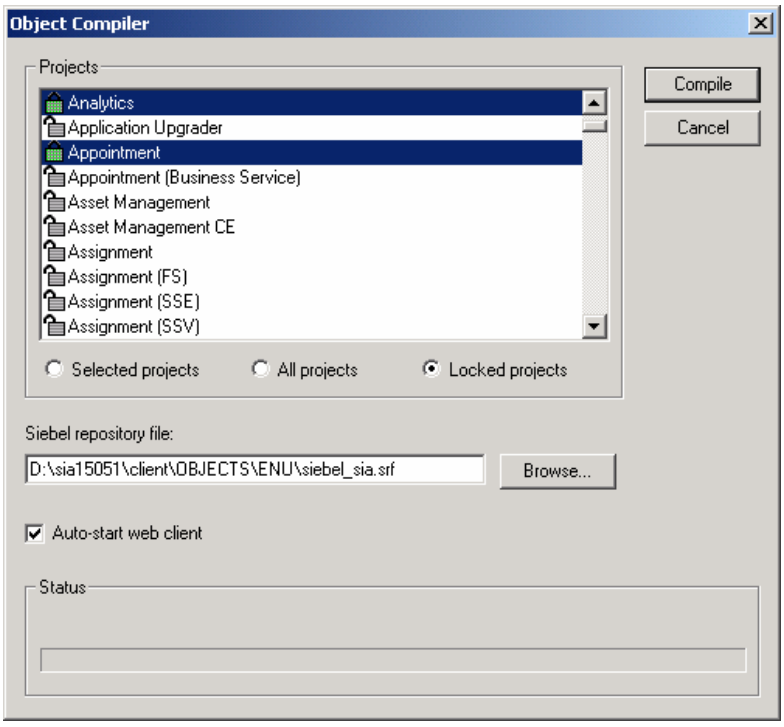


15) Choose Tools > Compile Projects. In the Object Compiler dialog, click Locked projects. Uncheck the Auto-start web client checkbox. Confirm that you are compiling to the correct .srf file, and then click Compile.



16) After the compilation is completed successfully, verify that Browser script files are generated under the folder defined in the Tools option (refer to step 14).

The folder name should look like <srf_timestamp>\bscripts\all. (for example: PUBLIC\enu\srf1116875545_444\bscripts\all)

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If you are using the thin client, upload this <srf_timestamp> folder on to your webserver under “SWEApp\PUBLIC\enu”.

If you are using the mobile or dedicated client, copy this folder under “<seaclient>\PUBLIC\enu” folder.

This completes the repository changes.

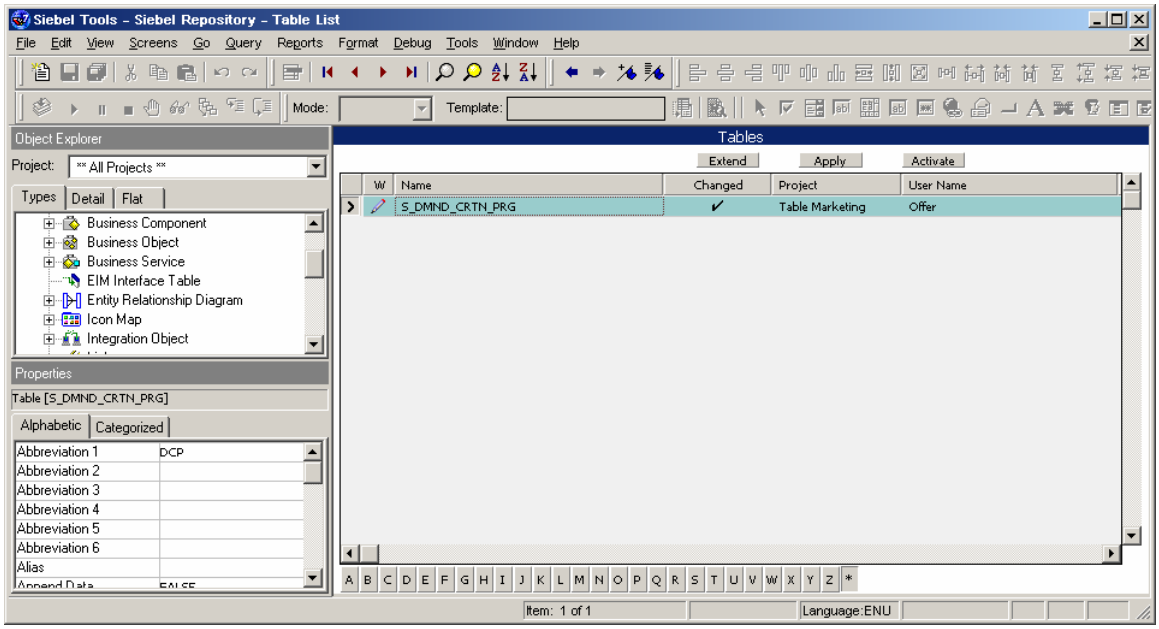
Note: Do not modify the scripts that are included with the CORE_HOR_SiebelRTD.sif file. Any changes may result in unexpected loss of function.

3.3.4 Applying Schema Changes

To apply the schema changes for the extension columns used by the Offer Synchronization feature, you need the ID of a database user that has ‘create table’ privileges. For more information, read *Siebel Tools Guide* in Siebel Bookshelf.

To apply the schema changes:

1) In Siebel Tools, in the Object Explorer pane on the left hand side, select the Table node.
2) In the Tables list, query for the changed table S_DMND_CRTN_PRG.
3) Click Apply at the top of the list.



4) In the Caution dialog, click OK.

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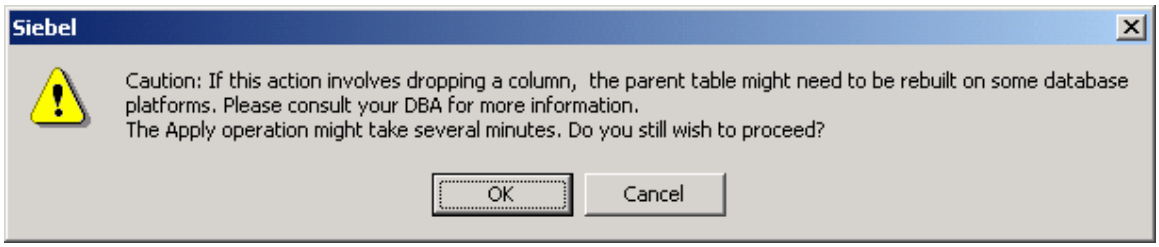
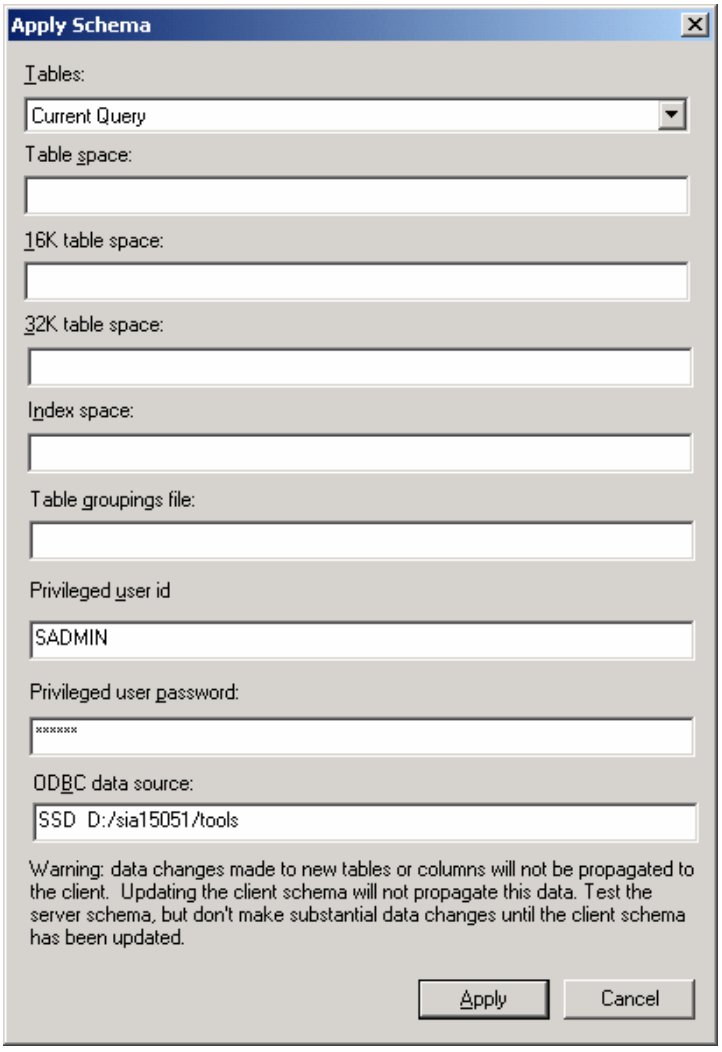


5) In the Apply Schema dialog, choose Current Query in the Tables drop-down menu. Enter the privileged user id and password fields. The user must have the privilege to create tables in the database.



6) Click Apply.

This completes the schema changes necessary for the Offer Synchronization.

When the repository and schema changes have been applied, verify that your modified .srf file is copied to the Siebel Enterprise Server directory so that you can boot the Siebel Enterprise Server with your applied changes.

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3.3.5 Adding Seed Data

You need to add new seed data that is used by the IOG application. This seed data is used for several purposes:

- Adding the new Views that were created by the .sif file.
- Adding the new Views to responsibilities.
- Adding the Host and Symbolic URL information for displaying the Decision Center and Decision Center reports in the integrated user-interface.
- Adding new LOVs related to Offer Synchronization.
- Adding new WebService Administration seed data.

To add the seed data:

1) Run the dataimp.exe utility to import the CORE_SeedData.dat file provided with the installation files.

    a. Locate the following file (see section *3.2-Installation Overview)* provided with your installation files:

    CORE_SeedData.dat

    b. Copy the file to the \bin\ directory for your Siebel Enterprise Server, for example:

    D:\siebelroot\SiebSrvr\bin

    c. Run the following statement from the command prompt to import the data:

    The syntax is:

    dataimp /u <userId> /p <password> /c <DSN Name> /d <Table Owner> /f <datafile>

    Example:

    dataimp /u SADMIN /p MSSQL /c SiebSrvr_Siebel /d dbo /f CORE_SeedData.dat

    For an explanation of the arguments for the dataimp utility, type 'dataimp' on the command line. *SieblSrvr_Siebel* is the ODBC data source name for the Siebel OLTP.

    d. Login to the application as an administrator. Please ensure that you have 'Edit Seed Data' mode enabled, by adding the /editseeddata command to the program shortcut or command line statement you use to launch the Mobile Web Client.

    e. Go to site map > Administration - Application > Views.

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f. Verify that the following view names were inserted. These records can be found by querying for *RTD* in the description column.

Name
SSO RTD Attrite Profile View
SSO RTD Cross Sell Offers View
SSO RTD Decision Center View
SSO RTD Eligibility Rules View (Phone Offer)
SSO RTD Eligibility Rules View (Web Offer)
SSO RTD Ideal Profile View (Phone Offer)
SSO RTD Ideal Profile View (Web Offer)
SSO RTD Influential Factors View (Phone Offer)
SSO RTD Influential Factors View (Web Offer)
SSO RTD Offer Status View (Phone Offer)
SSO RTD Offer Status View (Web Offer)

2) Associate the new views to your Marketing responsibilities.

Option 1: Modify the seed data responsibilities.

a. Confirm the names of the responsibilities actively used by your organization. (The standard application provides the Marketing Manager, Marketing Administrator, and Siebel Administrator responsibilities, but your deployment may use different responsibilities created by your administrator.)
b. Go to site map > Administration - Application > Responsibilities.
c. Query for your marketing Responsibility.
d. In the Views list, click ‘Add’ and query for Description = ‘*RTD*’. This should return the new views you created in step 1. Use Ctrl-A to select All and click OK.
e. Repeat steps d) and e) for other marketing responsibilities, if required.

Option 2: Create a new responsibility.

a. Go to site map > Administration - Application > Responsibilities
b. Create a new Responsibility.
c. In the Views list, click New and query for Description = ‘*RTD*’. This should return all the new views you created in step 1. Use Ctrl-A to select All and click OK.

3) Verify the new List of Values (LOV) data.

a. Go to site map > Administration - Data > List Of Values
b. Verify that the following LOVs were inserted by the data import file:

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Type	Display Value	Language Independent Code	Language Name	Parent LIC	Order	Active	Translate	Replication Level
LOV_TYPE	RTD_OFFER_GROUP	RTD_OFFER_GROUP	English-American		0	Y	Y	N
LOV_TYPE	RTD_OFFER_STATUS	RTD_OFFER_STATUS	English-American		0	Y	Y	N
LOV_TYPE	RTD_SYSTEM_PREF	RTD_SYSTEM_PREF	English-American		0	Y	Y	N

4) Verify that following LOVs were inserted by Data import file:

Type	Display Value	Language Independent Code	Language Name	Parent LIC	Order	Active	Translate
RTD_OFFER_GROUP	Acquisition	Acquisition	English-American		1	Y	Y
RTD_OFFER_GROUP	Awareness	Awareness	English-American		2	Y	Y
RTD_OFFER_GROUP	Cross-Sell	CrossSell	English-American		3	Y	Y
RTD_OFFER_GROUP	Loyalty	Loyalty	English-American		4	Y	Y
RTD_OFFER_GROUP	Referral	Referral	English-American		5	Y	Y
RTD_OFFER_GROUP	Up-Sell	UpSell	English-American		6	Y	Y
RTD_OFFER_GROUP	Customer Satisfaction	CustomerSatisfaction	English-American		7	Y	Y
RTD_OFFER_GROUP	Retention	Retention	English-American		8	Y	Y
RTD_OFFER_GROUP	Win-Back	Win-Back	English-American		9	Y	Y
Type	**Display Value**	**Language Independent Code**	**Language Name**	**Parent LIC**	**Order**	**Active**	**Translate**
RTD_OFFER_STATUS	N/A	N/A	English-American		1	Y	Y
RTD_OFFER_STATUS	Enabled	Enabled	English-American		2	Y	Y
RTD_OFFER_STATUS	Retired	Retired	English-American		2	Y	Y
Type	**Display Value**	**Language Independent Code**	**Language Name**	**Parent LIC**	**Order**	**Active**	**Translate**
RTD_SYSTEM_PREF	10000	RTD_WS_TIMEOUT	English-American		1	Y	Y
RTD_SYSTEM_PREF	[Application_Name]	RTD_APPLICATION_NAME	English-American		1	Y	Y
RTD_SYSTEM_PREF	[Default RTD Server]	DEFAULT_RTD_SERVER	English-American		1	Y	Y
RTD_SYSTEM_PREF	http://<hostname>	RTD_HOST_NAME	English-American		1	Y	Y
RTD_SYSTEM_PREF	rtis/sdwp	RTD_SOAP_END_POINT	English-American		1	Y	Y
RTD_SYSTEM_PREF	<Session_Cookie>	RTD_SESSION_COOKIE_NAME	English-American		1	Y	Y

5) Update following LOV values for your environment according to the instructions below:

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Language Independent code	Display Value	Instructions
RTD_WS_TIMEOUT	[time out value]	This value indicates the Time-Out (in milliseconds) for Informant / Advisor web services calls. Change this value as needed for your acceptable performance criteria. (e.g. 3000)
RTD_APPLICATION_NAME	[Application_Name]	Specify the application name on the Oracle RTD server, with which Offers would be synchronized, for example: SiebelB2C, SiebelB2B
DEFAULT_RTD_SERVER	[Default RTD Server]	This should be changed to Default Oracle RTD server that you will create later in this chapter (Refer to *3.3.7 - Creating a Default Oracle RTD Server* on page 36).
RTD_HOST_NAME	http://<hostname>	Change this value to the Web Server name, on which Oracle RTD server is installed. For example: http://RTDHost.siebel.com:8080
RTD_SOAP_END_POINT	rtis/sdwp	This is the remaining part of the SOAP URL, to which Siebel object manager communicates to for Advisor / Informant calls. RTD_HOST_NAME combined with RTD_SOAP_END_POINT form the SOAP URL.
RTD_SESSION_COOKIE_NAME	JSESSIONID	This is the name of the cookie that is passed between Siebel Enterprise Server and Oracle RTD Server to maintain session affinity.

6) If your base language for the Siebel Enterprise Server installation is not English (ENU), change the Language Name to your base language for the LOV records in the tables shown in Step 3.

7) After entering the new LOV values in steps 3, 4, and 5, click Clear Cache in the Application Administration - List of Values view (the same view where the LOV data was entered). Sometimes the 'Clear Cache' does not clear the old cache values. If possible, re-start the Siebel Enterprise Server.

8) Update the Host name for the Oracle RTD Server:

    a. Go to site map > Administration - Integration > WI Symbolic URL List > Host Administration.
    b. Query for the Virtual Name = RTD_SERVER.
    c. Update the Name to the host name of the Oracle RTD platform (for example: localhost:8080).

Name	Virtual Name	Authentication Type	Authentication Value
Your RTD Server Name	RTD_SERVER		

9) Update the Symbolic URLs that were added by the import process. This enables the integration of Oracle RTD Server reports within Siebel.

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a. Go to site map > Administration – Integration > WI Symbolic URL List > Symbolic URL Administration.

b. Query for any URLs containing *RTD_SERVER*. Verify the Host Name, Fixup Name, SSO Disposition, and Web Application to match the table below. (No update was necessary.) The Host Name should match the name of your Oracle RTD Server.

   Note: Make sure that the Host Name, Fixup Name and SSO Disposition columns are populated. You may need to use the select icon and pick applet to enter the value, because typing the text directly may not save the value.

Name	URL	Host Name	Fixup Name
DecisionCenter	http://RTD_SERVER/ui/workbench	*Your RTD Server Name*	Default
DecisionCenterAttriteProfile	http://RTD_SERVER/ui/workbench	*Your RTD Server Name*	Default
DecisionCenterCrossSellOffers	http://RTD_SERVER/ui/workbench	*Your RTD Server Name*	Default
DecisionCenterEligibilityRules	http://RTD_SERVER/ui/workbench	*Your RTD Server Name*	Default
DecisionCenterIdealProfile	http://RTD_SERVER/ui/workbench	*Your RTD Server Name*	Default
DecisionCenterInfluentialFactors	http://RTD_SERVER/ui/workbench	*Your RTD Server Name*	Default
DecisionCenterOfferStatus	http://RTD_SERVER/ui/workbench	*Your RTD Server Name*	Default

Name	Multi-value Treatment	SSO Disposition	Web Application Name
DecisionCenter		WebControl	
DecisionCenterAttriteProfile		WebControl	
DecisionCenterCrossSellOffers		WebControl	
DecisionCenterEligibilityRules		IFrame	
DecisionCenterIdealProfile		IFrame	
DecisionCenterInfluentialFactors		IFrame	
DecisionCenterOfferStatus		IFrame	

10) For each Symbolic URL verify that the following arguments were inserted by the import process.

   a. For each symbolic URL, update the argument value for argument ‘app’ with the appropriate IOG Inline Service name, for example SiebelB2C or SiebelB2B.

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b. By default, Siebel Object Manager authentication is assumed to have been set up in the Oracle RTD server. If you have set up Oracle RTD Platform authentication in the Oracle RTD server, then the username and password must be set to the credentials configured in the Oracle RTD server. For Oracle RTD Platform authentication, the Argument Type must be set to *Constant* and not *Command*.

Note: Oracle RTD platform authentication must be used when configuring the Symbolic URLs against a 2.2.1 version of the Oracle RTD server. Siebel Object Manager authentication has been deprecated in Oracle RTD server 2.2.1.

DecisionCenter

Name	Required Argument	Argument Type	Argument Value	Append as Argument	Substitute in Text	Sequence #
app	Y	Constant	CHANGE_ME	Y	N	1
username	Y	Command	UseSiebelLoginId	Y	N	2
password	Y	Command	UseSiebelLoginPassword	Y	N	3
deploymentstateid	Y	Constant	Max	Y	N	4
readonly	Y	Constant	True	Y	N	5
PostRequest	Y	Command	PostRequest	Y	N	6

DecisionCenterAttriteProfile

Name	Required Argument	Argument Type	Argument Value	Append as Argument	Substitute in Text	Sequence #
app	Y	Constant	CHANGE_ME	Y	N	1
username	Y	Command	UseSiebelLoginId	Y	N	2
password	Y	Command	UseSiebelLoginPassword	Y	N	3
deploymentstateid	Y	Constant	max	Y	N	4
url	Y	Constant	choice/choice_analyze_ideal.jsp	Y	N	5
type	Y	Constant	choice	Y	N	6
object	Y	Constant	ChurnIndicatorEvent	Y	N	7
use	Y	Constant	portal	Y	N	8
custom	Y	Constant	false	Y	N	9
PostRequest	Y	Command	PostRequest	Y	N	10

DecisionCenterCrossSellOffers

Name	Required Argument	Argument Type	Argument Value	Append as Argument	Substitute in Text	Sequence #
app	Y	Constant	CHANGE_ME	Y	N	1
username	Y	Command	UseSiebelLoginId	Y	N	2
password	Y	Command	UseSiebelLoginPassword	Y	N	3
deploymentstateid	Y	Constant	max	Y	N	4

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url	Y	Constant	choicegroup/choicegroup_measure_counts.jsp	Y	N	5
type	Y	Constant	choiceGroup	Y	N	6
object	Y	Constant	IntelligentOffers	Y	N	7
use	Y	Constant	portal	Y	N	8
custom	Y	Constant	false	Y	N	9
PostRequest	Y	Command	PostRequest	Y	N	10

DecisionCenterEligibilityRules

Name	Required Argument	Argument Type	Argument Value	Append as Argument	Substitute in Text	Sequence #
app	Y	Constant	CHANGE_ME	Y	N	1
username	Y	Command	UseSiebelLoginId	Y	N	2
password	Y	Command	UseSiebelLoginPassword	Y	N	3
deploymentstateid	Y	Constant	Max	Y	N	4
url	Y	Constant	choice/externalchoice_eligibility.jsp	Y	N	5
externalId	Y	Field	Id	Y	N	6
showName	Y	Constant	true	Y	N	7
IFrame	Y	Command	iframe width="100%" height="225" name="RTDIFrame"	Y	N	8
PostRequest	Y	Command	PostRequest	Y	N	9

DecisionCenterIdealProfile

Name	Required Argument	Argument Type	Argument Value	Append as Argument	Substitute in Text	Sequence #
app	Y	Constant	CHANGE_ME	Y	N	1
username	Y	Command	UseSiebelLoginId	Y	N	2
password	Y	Command	UseSiebelLoginPassword	Y	N	3
deploymentstateid	Y	Constant	max	Y	N	4
url	Y	Constant	choice/externalchoice_bestfit.jsp	Y	N	5
type	Y	Constant	choice	Y	N	6
externalId	Y	Field	Id	Y	N	7
showName	Y	Constant	True	Y	N	8
IFrame	Y	Command	iframe width="100%" height="225" name="RTDIFrame"	Y	N	9
PostRequest	Y	Command	PostRequest	Y	N	10

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DecisionCenterInfluentialFactors

Name	Required Argument	Argument Type	Argument Value	Append as Argument	Substitute in Text	Sequence #
app	Y	Constant	CHANGE_ME	Y	N	1
username	Y	Command	UseSiebelLoginId	Y	N	2
password	Y	Command	UseSiebelLoginPassword	Y	N	3
deploymentstateid	Y	Constant	max	Y	N	4
url	Y	Constant	choice/externalchoice_drivers.jsp	Y	N	5
type	Y	Constant	choice	Y	N	6
externalId	Y	Field	Id	Y	N	7
showName	Y	Constant	True	Y	N	8
IFrame	Y	Command	iframe width="100%" height="225" name="RTDIFrame"	Y	N	9
PostRequest	Y	Command	PostRequest	Y	N	10

DecisionCenterOfferStatus

Name	Required Argument	Argument Type	Argument Value	Append as Argument	Substitute in Text	Sequence #
app	Y	Constant	CHANGE_ME	Y	N	1
username	Y	Command	UseSiebelLoginId	Y	N	2
password	Y	Command	UseSiebelLoginPassword	Y	N	3
url	Y	Constant	choice/externalchoice_deployment.jsp	Y	N	4
externalId	Y	Field	Id	Y	N	5
showName	Y	Constant	True	Y	N	6
IFrame	Y	Command	iframe width="100%" height="225" name="RTDIFrame"	Y	N	7
PostRequest	Y	Command	PostRequest	Y	N	8
Label	Y	Field	Name	Y	N	9

3.3.6 Importing Outbound Web Service Seed Data

To import seed data for the outbound web service:

1) Verify that the following LOV exists in the database. If not, create one as follows:
    a. Navigate to site map > Application Administration > List of Values
    b. Create new LOV record as mentioned above.

Type	Display Value	Language Independent Code	Parent LIC	Active
WS_BINDING_PROTOCOL_CD	SOAP_DOC	SOAP_DOC	OUTBOUND	Y

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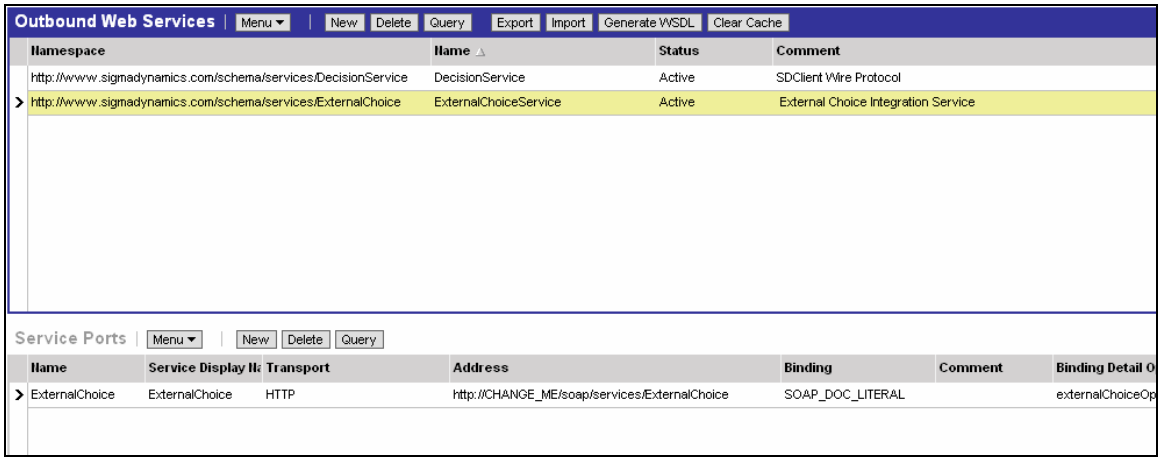
c. Clear the LOV cache by clicking the Menu button and choosing the Clear Cache command or by clicking Clear Cache. For the new set of values to take effect, you should clear the LOV cache after you have inserted the new values.

2) Go to site map > Administration – Web Services > Outbound Web Services.

3) Import CORE_*ExternalChoiceService.XML* by clicking Import on the Outbound Services List Applet.

4) At the end of the import process, verify that new Outbound Web Service by name "ExternalChoiceService" is created.

5) In the middle Service Ports list applet, update the Address field to point to the Oracle RTD Server host name, for example: http://localhost:8080/soap/services/ExternalChoice.



6) Repeat the above steps to import *CORE_DecisionService.XML* file. At the end of the import, verify that the new Outbound Web Service by name "DecisionService" exists. For this web service you do not have to specify an Oracle RTD host name.

3.3.7 Creating a Default Oracle RTD Server

To synchronize offers with the Oracle RTD server, a server entry needs to be created that provides an administrator login to the Oracle RTD server. To complete the offer synchronization job successfully, this user must be able to login to the Oracle RTD server.

To add a default Oracle RTD Server:

1) Go to site map > Administration - Marketing > Servers.

2) Click the Servers tab.

3) Click New.

4) In the Name column, enter the name of the Oracle RTD Server entered for the RTD_SYSTEM_PREF > DEFAULT_RTD_SERVER list of values entry (see section *3.3.5 Adding Seed Data*).

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5) In the User Name and Password columns, enter the corresponding ID and Password for the administrator to be used for Offer Synchronization by Marketing users.
6) Enter any value in the DSN column (the value does not matter).
7) Select any Type for the server record (the type value does not matter).
8) Save the record.

Note: After creating the Server record, be sure to go back to Application Administration > List of Values and update the LOV for the Default Oracle RTD Server. Query for Language-Independent Code = DEFAULT_RTD_SERVER and change the Display Value to the reference name of the server record you created in this section.

3.4 Installation of the IOG B2C Application on Siebel Enterprise Server

3.4.1 Overview

Installation of the IOG B2C application includes the following high-level tasks:

1) Importing a .sif file containing the repository changes. This file includes:
   - User interface changes for new views, new and modified applets and new fields and columns.
2) Adding new seed data to support the IOG, including:
   - New Views
   - Runtime Events seed data to call informants
   - Communication events to call informants

After importing the .sif file, compile a new Siebel Repository file (.srf file). Prior to beginning this task, review the *Siebel Tools Reference Guide* (Chapter 17 – Repositories).

3.4.2 Pre-Installation Tasks

Before importing the .sif file:

- Backup your existing Siebel Repository file (.srf).
- Backup your existing Siebel database (in your development environment).
- Shut down the Siebel Enterprise Server, on which you will be compiling the repository changes.

3.4.3 Import of Repository Changes

To import the .sif file of repository changes:

1) Stop the Siebel Enterprise Server.
2) Log into Siebel Tools connected to the Server database.

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3) In the Object Explorer pane on the left hand side, select the 'Project' node.
4) Lock the following projects:
    - Project 'Contact'
    - Project 'Contact (SSE)'
    - Activity
    - Project 'RTD Integration' (if not already locked)
5) Choose Tools > Import from Archive.
6) In the dialog, click Yes.
7) In the Select Archive to Import dialog, browse for file *B2C_HOR_SiebelRTD.sif (*Note: If you are deploying the IOG application on a vertical environment, use *B2C_SIA_SiebelRTD.sif* file for import) and click Open. See section *3.2-Installation Overview* for location of the .sif files.
8) In the Import Wizard – Preview dialog, in the Conflict Resolution area, click '*Merge the object definition from the archive file with the definition in the repository*'. (This is the default option and is the second option displayed in the Conflict Resolution section.) Click Next.
9) The Import Wizard compares the object differences between the .sif file and the repository. When the comparison completes, use the dialog to review the changes to be made. To accept the changes and continue, click Next.
10) In the next dialog, click Yes to confirm that you agree to the changes.

    Note: The number of objects inserted, deleted, or updated could be different based on environmental differences and custom configuration.
11) The Import Wizard merges the repositories. This typically takes a few minutes to complete. As the merge is performed the changes are logged to the dialog box. When the merge has completed, click Finish.

    Optionally, you can backup the log file shown at the end of the merge dialog for future reference.

12) Confirm that Siebel Tools is set to the correct language that you wish to compile. In Siebel Tools, choose View > Options. In the dialog, click the Language Settings tab.
13) Choose Tools > Compile Projects. In the Object Compiler dialog, click Locked projects. Clear the Auto-start web client checkbox. Confirm that you are compiling to the correct .srf file, and then click Compile.

This completes the repository changes.

Note: Do not modify the scripts that are included with the B2C_HOR_SiebelRTD.sif file. Any changes may result in unexpected loss of function.

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3.4.4 Adding Seed Data

You must add new seed data that is used by IOG. This seed data is used for several purposes:

- Adding the new Views that were created by the .sif file.
- Adding the new Views to responsibilities.
- Adding Runtime Events seed data.
- Adding Communication configuration related seed data.

To add the seed data:

1) Run the dataimp.exe utility to import the B2C_SeedData.dat file provided with the installation files.
    a. Locate the following file provided with your installation files:

       B2C_SeedData.dat

    b. Copy the file to the \bin\ directory for your Siebel Enterprise Server, for example:

    c. Copy the file to the \bin\ directory for your Siebel Enterprise Server, for example:

       D:\siebelroot\SiebSrvr\bin

    d. Run the following statement from the command prompt to import the data. The syntax is:

       dataimp /u <userId> /p <password> /c <DSN Name> /d <Table Owner> /f <datafile>

       Example:

       dataimp /u SADMIN /p MSSQL /c SiebSrvr_Siebel /d dbo /f B2C_SeedData.dat

       (For an explanation of the arguments for utility, type ‘dataimp’ on the command line.)

    e. Login to the Siebel application as an administrator.

    f. Go to site map > Administration - Application > Views.

    g. Verify that the following view names were inserted. These records can be found by querying for *RTD* in the description column.

Name
Contact Summary View (RTD)

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2) Associate the new views to your Marketing responsibilities.

Option 1: Modify the seed data responsibilities.

a. Confirm the names of the responsibilities actively used by your organization. (The standard application provides the Marketing Manager, Marketing Administrator, and Siebel Administrator responsibilities, but your deployment may use different responsibilities created by your administrator)
b. Enable 'Edit Seed Data' mode by adding the /editseeddata command to the program shortcut or command line statement you use to launch the Mobile Web Client.
c. Go to site map > Administration - Application >Responsibilities.
d. Query for your Marketing user responsibility.
e. In the Views list, click New, and then Query for Description = '*RTD*'. This should return the new view you created in step 1. Select the record and click 'OK'.
f. Repeat steps d) and e) for other marketing responsibilities, if required.

Option 2: Create a new responsibility.

a. Go to site map > Administration - Application > Responsibilities.
b. Create a new Responsibility.
c. In the Views list, click New, and then query for Description = '*RTD*'. This should return the new view you created in step 1. Select the record and click 'OK'.

3.4.4.1 Verify Runtime Event Seed Data

Verify that the following Runtime events seed data was imported by import process

a. Go to site map > Administration – Runtime Events > Action Sets
b. Query for *RTD* in the Name field. Check that the following records exist:

Name	Start Date	End Date	Active	Enable Export	Description
RTD Informant: Call Reason (B2C)			Y	Y	RTD Integration : Call Reason Informant runtime event
RTD Informant: Update Customer Profile (B2C)			Y	Y	RTD Integration : Update Customer Profile Informant runtime event
RTD Informant: Offer Event Interested (B2C)			Y	Y	RTD Integration : Offer Interested Informant runtime event
RTD Informant: Offer Event Not Interested (B2C)			Y	Y	RTD Integration : Offer not Interested Informant runtime event

c. Go to site map > Administration – Runtime Events > Events
d. Query for 'Action Set Name' containing *RTD*. Verify that the following records exist:

Name	Sequence	Object Type	Object Name	Event	Subevent	Conditional Expression	Action Set Name
	1	Applet	Contact Activity List Applet (RTD)	InvokeMethod	WriteRecord	[Type] = LookupValue ('TODO_TYPE' , 'Call - Inbound')	RTD Informant: Call

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							Reason (B2C)
	1	Applet	Contact Form Applet	InvokeMethod	WriteRecord		RTD Informant: Update Customer Profile (B2C)
	1	BusComp	RTD Intelligent Offers (B2C)	PreInvokeMethod	Interested		RTD Informant: Offer Event Interested (B2C)
	1	BusComp	RTD Retention Actions (B2C)	PreInvokeMethod	Interested		RTD Informant: Offer Event Interested (B2C)
	1	BusComp	RTD Intelligent Offers (B2C)	PreInvokeMethod	NotInterested		RTD Informant: Offer Event Not Interested (B2C)
	1	BusComp	RTD Retention Actions (B2C)	PreInvokeMethod	NotInterested		RTD Informant: Offer Event Not Interested (B2C)

3.4.5 Import Communication Configuration Seed Data

a. Go to site map > Administration – Communications > All Configurations.
b. Create a new Configuration record, specify the name (for example: “Oracle RTD Comm configuration”) and then the save record.
c. Import *B2C_Comm_Config.def* by clicking Import Configuration in the Configurations List applet. On the import configuration popup check all check boxes, and click OK to start the import.

d. When the import is complete, make sure you add all valid Call Center agents under the All Configuration > Agents tab.

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e. Ensure that you associate appropriate Communication Profiles under All Configuration > Profiles tab to newly created Configuration record.

3.5 Installation of the IOG B2B Application on Siebel Enterprise Server

3.5.1 Overview

Installation of the IOG B2B application includes the following high-level tasks:

1) Importing a .sif file containing the repository changes. This file includes:
   - User interface changes for new views, new and modified applets, and new fields and columns.

2) Adding new seed data to support IOG, including:
   - New Views
   - Runtime Events seed data to call informants
   - Communication events to call informants

After importing the .sif file, the compile a new Siebel Repository file (.srf file). Prior to beginning this task, review the *Siebel Tools Reference Guide* (Chapter 17 – Repositories).

3.5.2 Pre-Installation Tasks

Before importing the .sif file:

- Backup your existing Siebel Repository file (.srf).
- Backup your existing Siebel database (in your development environment).
- Shut down the Siebel Enterprise Server, on which you will be compiling the repository changes.

3.5.3 Import of Repository Changes

To import the .sif file of repository changes:

1) Stop the Siebel Enterprise Server.
2) Log into Siebel Tools connected to the Server database.
3) In the Object Explorer pane on the left hand side, select the ‘Project’ node.
4) Lock the following projects:
   a. Project ‘Account
   b. Project ‘Account (SSE)’
   c. Activity
   d. Project ‘RTD Integration’ (if not already locked)
5) Choose Tools > Import from Archive.
6) In the dialog window, click Yes.

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7) In the Select Archive to Import dialog, browse for file *B2B_HOR_SiebelRTD.sif (*Note: If you are deploying IOG application on verticals environment, use *B2B_SIA_SiebelRTD.sif* file for import) and click Open. See section *3.2-Installation Overview* for location of the .sif files.

8) In the Import Wizard – Preview dialog, in the Conflict Resolution area, click '*Merge the object definition from the archive file with the definition in the repository*'. (This is the default option and is the second option displayed in the Conflict Resolution section.) Click Next.

9) The Import Wizard compares all the object differences between the .sif file and the repository. When the comparison completes, use the dialog to review the changes to be made. To accept the changes and continue, click Next.

10) In the next dialog, click Yes to confirm that you agree to the changes.

    Note: The number of objects inserted, deleted, or updated could be different based on environmental differences and custom configuration.

11) The Import Wizard merges the repositories. This typically takes a few minutes to complete. As the merge is performed the changes will be logged to the dialog box. When the merge has completed, click Finish.

    Optionally, you can backup the log file shown at the end of the merge dialog for future reference.

12) Confirm that Siebel Tools is set to the correct language that you wish to compile. In Siebel Tools, choose View > Options. In the dialog, click the Language Settings tab.

13) Choose Tools > Compile Projects. In the Object Compiler dialog, click Locked projects. Clear the Auto-start web client checkbox. Confirm that you are compiling to the correct .srf file, and then click Compile.

This completes the repository changes.

Note: Do not modify the scripts that are included with the B2B_HOR_SiebelRTD.sif file. Any changes may result in unexpected loss of function.

3.5.4 Adding Seed Data

You must add new seed data that is used by IOG. This seed data is used for several purposes:

- Adding the new Views that were created by the .sif file.
- Adding the new Views to responsibilities.
- Adding Runtime Events seed data.
- Adding Communication configuration related seed data.

To add the seed data:

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1) Run the dataimp.exe utility to import the B2B_SeedData.dat file provided with the installation files.

    a. Locate the following file provided with your installation files:

       B2B_SeedData.dat

    b. Copy the file to the \bin\ directory for your Siebel Enterprise Server, for example:

       D:\siebelroot\SiebSrvr\bin

    c. Run the following statement from the command prompt to import the data. The syntax is:

       dataimp /u <userId> /p <password> /c <DSN Name> /d <Table Owner> /f <datafile>

       Example:

       dataimp /u SADMIN /p MSSQL /c SiebSrvr_Siebel /d dbo /f B2B_SeedData.dat

       (For explanation of the arguments for utility, type 'dataimp' on the command line.)

    d. Login to the Siebel application as an administrator.

    e. Go to site map > Administration - Application > Views.

    f. Verify that the following view names were inserted. These records can be found by querying for *RTD* in the description column.

Name
Customer Account Portal View (RTD)

2) Associate the new views to your Marketing responsibilities.

Option 1: Modify the seed data responsibilities.

    a. Confirm the names of the responsibilities actively used by your organization. (The standard application provides the Marketing Manager, Marketing Administrator, and Siebel Administrator responsibilities, but your deployment may use different responsibilities created by your administrator)
    b. Enable 'Edit Seed Data' mode by adding the /editseeddata command to the program shortcut or command line statement you use to launch the Mobile Web Client.
    c. Go to site map > Administration - Application >Responsibilities.
    d. Query for your Marketing user responsibility.

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e. In the Views list, click New, and the query for Description = '*RTD*'. This should return the new view you created in step 1. Select the record and click 'OK'.
f. Repeat steps d) and e) for other marketing responsibilities, if required.

Option 2: Create a new responsibility.

a. Go to site map > Administration - Application > Responsibilities
b. Create a new Responsibility.
c. In the Views list, click New, and then query for Description = '*RTD*'. This should return the new view you created in step 1. Select the record and click 'OK'.

3.5.4.1 Verify Runtime Event Seed Data

Verify that following Runtime events seed data was imported by import process:

a. Go to site map > Administration – Runtime Events > Action Sets.
b. Query for *RTD* in the Name field. Check that the following records exist:

Name	Start Date	End Date	Active	Enable Export	Description
RTD Informant: Call Reason (B2B)			Y	Y	RTD Integration : Call Reason Informant runtime event
RTD Informant: Update Customer Profile (B2B)			Y	Y	RTD Integration : Update Customer Profile Informant runtime event
RTD Informant: Offer Event Interested (B2B)			Y	Y	RTD Integration : Offer Interested Informant runtime event
RTD Informant: Offer Event Not Interested (B2B)			Y	Y	RTD Integration : Offer not Interested Informant runtime event

c. Go to site map > Administration – Runtime Events > Events.
d. Query for 'Action Set Name' containing *RTD*. Verify that the following records exist:

Name	Sequence	Object Type	Object Name	Event	Subevent	Conditional Expression	Action Set Name
	1	Applet	Account Activity List Applet (RTD)	InvokeMethod	WriteRecord	[Type] = LookupValue ('TODO_TYPE' , 'Call - Inbound')	RTD Informant: Call Reason (B2B)
	1	Applet	Account Entry Applet	InvokeMethod	WriteRecord		RTD Informant: Update Customer Profile (B2B)
	1	BusComp	RTD Intelligent Offers (B2B)	PreInvokeMethod	Interested		RTD Informant:Offer Event Interested (B2B)
	1	BusComp	RTD Retention Actions (B2B)	PreInvokeMethod	Interested		RTD Informant:Offer Event Interested (B2B)

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	1	BusComp	RTD Intelligent Offers (B2B)	PreInvokeMethod	NotInterested		RTD Informant:Offer Event Not Interested (B2B)
	1	BusComp	RTD Retention Actions (B2B)	PreInvokeMethod	NotInterested		RTD Informant:Offer Event Not Interested (B2B)

3.5.5 Import Communication Configuration Seed Data

1) Go to site map > Administration – Communications > All Configurations.
2) Create a new Configuration record, specify the name (for example: "Oracle RTD Comm configuration") and then Save the record.
3) Import *RTD_Comm_Config.def* by clicking Import Configuration in the Configurations List applet. On the import configuration popup check all check boxes, and click 'OK' to start the import.

4) When the import is complete, make sure you add all valid Call Center agents under the All Configuration > Agents tab.
5) Ensure that you associate appropriate Communication Profiles under All Configuration > Profiles tab to the newly created Configuration record.

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4 Configuring IOG in Siebel Enterprise Server 8.0

This chapter describes how marketing managers can use and configure the Intelligent Offer Generation (IOG) solution with Siebel 8.0. The IOG solution uses the Oracle Real-Time Decisions (RTD) platform.

This chapter includes the following topics:

- About Oracle Real-Time Decisions for Call Center
- Scenario for Intelligent Offer Generation in Call Center
- Process of Configuring the IOG Application for Siebel Call Center
- Checking Prerequisites for IOG
- Configuring Outbound Web Services for Oracle RTD
- Configuring IOG with Siebel Views for Siebel Call Center
- Setting Siebel Enterprise Server Parameters for IOG
- Configuring Siebel Run-Time Events for Oracle RTD for Siebel Call Center
- Customizing Call Reasons for Oracle RTD for Siebel Call Center
- Process of Setting Up Real-Time Intelligent Offers for Siebel Call Center
- Defining the Campaign for IOG for Siebel Call Center
- Creating and Modifying IOG Offers for Siebel Call Center
- Enabling IOG Offers for Siebel Call Center
- Opening Decision Center for Editing for IOG for Siebel Call Center
- Specifying Eligibility for Offers for Oracle RTD for Siebel Call Center
- Updating Offer Information for Oracle RTD for Siebel Call Center
- Activating the Offers for Oracle RTD for Siebel Call Center
- IOG Views for Call Center Agents

4.1 About Oracle Real-Time Decisions for Call Center

The IOG solution provides intelligent offer recommendation and retention management features to call center agents who receive inbound customer communications. This solution uses the decisioning capabilities of the Oracle RTD platform.

Oracle RTD combines predictive analytics technology with dynamic eligibility rules and scoring rules to maximize the value from inbound customer interactions. The criteria for rules can be based on a variety of attributes, for example, the age of a customer, the salary of a customer, recent life events, and so on. Oracle RTD can anticipate customer needs in real time and adapt each interaction to the needs of the customer. The decision logic of Oracle RTD for Call Center and the integration points with Siebel Enterprise are implemented as an Inline Service. The Inline Service runs on an Oracle RTD server.

While you are in a view, click Reports to see a list of the available preconfigured reports for the data in that view. The list specifies which reports are available as Actuate reports and which are available as Oracle Business Intelligence Publisher reports. From the list you can access individual reports. For more information about reports, see *Siebel Reports Administration Guide*.

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4.2 Scenario for Intelligent Offer Generation in Call Center

This topic gives one use case of how IOG can be used. You may use IOG differently, depending on your business model.

A marketing manager has been asked to use the call center to drive proactive retention management and increase revenues from cross- and up-sell offers. The manager decides to implement the Intelligent Offer Generation Application for Siebel Call Center.

The marketing manager asks the marketing or system administrator to configure the Oracle RTD server. After the system administrator configures IOG, the marketing manager uses Siebel Marketing to create a marketing campaign specifically for inbound calls.

Then, the marketing manager creates offers within the campaign. Each offer can have one or more associated treatments. A treatment is a form of an offer that is specific to a particular channel. For example, you might have a phone treatment of an offer. After Oracle RTD is synchronized with Siebel Enterprise Server, choices in Oracle RTD correspond to treatments in Siebel Enterprise Server. After the marketing manager creates offers within the campaign, the manager can then change some settings for the treatments associated with the offer. For example, the manager can add a profit margin figure associated with an offer.

The marketing manager can then create rules, or groups of rules, which determine the eligibility of customers for an offer. For example, the manager might set up rules so that an offer is eligible only to customers over the age of 21 years, with a salary of more than $35,000.

The marketing manager can now add or update offer information, such as the profit margin associated with the offer. The marketing manager must then deploy the updates to an Inline Service to make the offers available to agents. Agents can then work with views in Siebel Call Center as they receive calls from customers.

4.3 Process of Configuring the IOG Application for Siebel Call Center

To configure IOG, perform the following tasks:

1) Checking Prerequisites for IOG
2) Configuring Outbound Web Services for Oracle RTD
3) Configuring IOG with Siebel Views for Siebel Call Center
4) Setting Siebel Enterprise Server Parameters for IOG
5) Configuring Siebel Run-Time Events for Oracle RTD for Siebel Call Center
6) Customizing Call Reasons for Oracle RTD for Siebel Call Center

4.4 Checking Prerequisites for IOG

Before you configure IOG, you must complete the following actions:

- Install the latest version of Oracle RTD platform.

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- Install and deploy the SiebelB2B or SiebelB2C Inline Service on the Oracle RTD server. You can integrate only one Inline Service with Siebel Enterprise Server at a time, so you must choose your Inline Service before you configure IOG.

For more information on installing and configuring the Oracle RTD platform and IOG inline services, see section *2 - Configuring IOG Inline Service in Oracle RTD Platform*.

4.5 Configuring Outbound Web Services for Oracle RTD

Siebel Enterprise Server uses Enterprise Application Integration (EAI) Outbound Web Services to communicate with Oracle RTD for Siebel Call Center. Seed data for outbound Web services is provided with the product, but you must update the data to refer to the correct Inline Service.

To configure outbound Web services

1) Navigate to the Administration - Web Services screen > Outbound Web Services view.
2) Query the list for namespaces that contain the string sigma.
3) Select the ExternalChoiceService record.
4) In the Service Ports applet, type the address of your Oracle RTD server in the Address field. For example, you might use an address like

   http://services.corp.example.com:8080/soap/services/ExternalChoice.

   Note: Do not modify the DecisionService record.

5) Click on the Clear Cache button on the Outbound Web Services view.

4.6 Configuring IOG with Siebel Views for Siebel Call Center

Siebel Portal Framework enables IOG to integrate effectively with Siebel views for Siebel Call Center. Seed data for this integration is provided with the product, but you must make some updates to see Oracle RTD reports in Siebel views.

To configure IOG with Siebel views

1) Navigate to the Administration - Integration screen > WI Symbolic URL List view.
2) Select Host Administration from the visibility filter.
3) Query the list for a virtual name called RTD_SERVER.
4) In the record with the virtual name RTD_SERVER, type the host name of the Oracle RTD server in the Name field. For example, you might use a hostname like services.corp.example.com:8080.
5) Select Symbolic URL Administration from the visibility filter.
6) Query the list for a virtual name called RTD_SERVER.

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7) For each record that has a URL that contains RTD, use the Symbolic URL Arguments applet to update the Argument Value of the argument to the appropriate Inline Service. For example, update the argument value of the DecisionCenter record to SiebelB2C or SiebelB2B.

8) Select the appropriate authentication.

   Note: Siebel Object Manager Authentication is not supported with Oracle RTD Platform Version 2.2.1. For IOG implementations using Oracle RTD server 2.2.1, the RTD platform authentication must be used.

   If you are using Oracle RTD platform 2.2.1 or are using Oracle RTD platform 2.2 and want to use RTD platform authentication, then you must update the username and password arguments as shown in the following table:

Name	Type	Value
username	Constant	*RTD_platform_user, e.g.* sdsu
password	Constant	*RTD_platform_user_password*, e.g. sdsu

   The *RTD_platform_user* must be already set up in RTD platform, as described in section *2.5.1-Setting up Oracle RTD Platform (DB) Authentication*.

4.7 Setting Siebel Enterprise Server Parameters for IOG

You must configure particular parameters in Siebel Enterprise Server so that offer synchronization, and Advisor or Informant functionality perform correctly.

To configure for Offer Sync and Advisor/Informant

1) Navigate to the Administration - Server Configuration screen > Servers list > Parameters view.

2) Query the list for parameters that begin with the string RTD.

3) Enter values for each of the Oracle RTD parameters, as described in the following table:

Name	Description	Example
RTD Application Name	Type the name of the Oracle RTD inline service. This parameter is used provide the following functions between Siebel Enterprise Server and Siebel Call Center RTD: • Offer synchronization • Real-time communication, for example, with integration points	SiebelB2B
RTD SOAP URL	Type the Simple Object Access Protocol (SOAP) URL for the Oracle RTD server. The Oracle RTD Integration Business service uses this to make Advisor and Informant SOAP calls.	http:// services.corp.example.com: 8080/rtis/sdwp

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RTD Session Cookie Name	Type the name of the cookie for the Oracle RTD Server to use to load balance calls for Web services from the Siebel Enterprise Server. If you do not want to use any hardware- or software-based load balancing tools, use the default value JSESSIONID.	JSESSIONID
RTD WebService Timeout	Type the interval, in milliseconds, after which you want the Oracle RTD Advisor or Informant Web service calls to time out.	3000

4.8 Configuring Siebel Run-Time Events for Oracle RTD for Siebel Call Center

Siebel Enterprise Server uses run-time events to communicate data changes from Siebel Object Manager to Oracle RTD for Siebel Call Center. Seed data for run-time events is provided with the product, but the run-time events are not enabled by default. You must enable Oracle RTD-related events for IOG to function correctly.

To enable Oracle RTD-related run-time events

1) Navigate to the Administration - Runtime Events screen > Action Sets view.
2) Query the list for the parameters that begin with the string RTD.
3) Select the Active check box for all of the records that correspond with the Inline Service that you use. For example, if you use SiebelB2C Inline Service, select the Active check box only for the records that are labelled as B2C.
4) Choose Reload Runtime Events from the menu.

   This action clears and reloads the run-time events cache.

4.9 Customizing Call Reasons for Oracle RTD for Siebel Call Center

When a customer calls your business, your agents can record the reason for the call. Your agents record the reasons in the Activities applet in the Contact Summary (Oracle RTD) and Account Summary (Oracle RTD) views.

By default, a number of call reasons are included with Siebel Business Applications. You can customize the list of call reasons. You can deactivate the default call reasons, and add call reasons that are relevant to your business.

To customize call reasons

1) Navigate to the Administration - Data view > List of Values screen.
2) Query the list for the list-of-value types with the Type of TODO_TYPE and with the Parent LIC of Call - Inbound.
3) Deselect the Active check box for any of the call reasons that are not relevant to your business.
4) Add any list-of-value types that are specific to your business.

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4.10 Process of Setting Up Real-Time Intelligent Offers for Siebel Call Center

To set up real-time intelligent offers and retention treatments, perform the following tasks:

1) Defining the Campaign for IOG for Siebel Call Center
2) Creating and Modifying IOG Offers for Siebel Call Center
3) Enabling IOG Offers for Siebel Call Center
4) Opening Decision Center for Editing for IOG for Siebel Call Center
5) Specifying Eligibility for Offers for Oracle RTD for Siebel Call Center
6) Updating Offer Information for Oracle RTD for Siebel Call Center
7) Activating the Offers for Oracle RTD for Siebel Call Center

4.11 Defining the Campaign for IOG for Siebel Call Center

In the Siebel Marketing application, offers are presented to customers in the context of marketing campaigns. Before you can implement IOG offers, you must create a campaign in Siebel Marketing. For information about how to create a campaign, see the *Siebel Marketing User Guide*.

4.12 Creating and Modifying IOG Offers for Siebel Call Center

Offers are a way to present incentives on products and services to current and potential customers as part of a campaign. Offers are presented to customers in the context of marketing campaigns.

Before you can implement IOG offers, you must create them within a campaign in Siebel Marketing. Add the treatments that you require to the offers. For more information about offers and treatments, see the *Siebel Marketing User Guide*.

4.13 Enabling IOG Offers for Siebel Call Center

Before you can use an IOG offer, you must change some settings for the treatments associated with the offer.

To enable IOG offers

1) Navigate to the Offers screen > Phone Treatments list, or Offers screen > Web Treatments list.
2) Select the offer that you want to work with.
3) In the Treatments view, drill down on the treatment you want to work with.

   Alternatively, create a new treatment, then drill down on the new treatment.
4) On the treatment screen, click the Real-Time Details tab.
5) Select Enabled from the Stage drop-down list.

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6) Select the group with which you want to associate the offer from the Offer Group drop-down list.
7) Select a campaign with which to associate the offer from the Campaign field, and click the Sync button.

4.14 Opening Decision Center for Editing for IOG for Siebel Call Center

Before you use IOG, you can update offer-related information. For example, you can specify offer eligibility rules. You make these changes in the Decision Center, but before you make the changes you must open the Decision Center for edit operations.

To open Decision Center for edit operations

1) Navigate to the Administration - Marketing screen > Decision Center view.
2) Click the Open button in the Decision Center view.
3) Select the Inline Service with which you want to work, check Open the Inline Service for editing, and click OK.
4) Click the Perspective button, select the Design perspective, and then click OK.

4.15 Specifying Eligibility for Offers for Oracle RTD for Siebel Call Center

By default, all offers are eligible for all customers. You can set up rules, or groups of rules, to determine the eligibility of customers for an offer.

An *eligibility rule* is a relational expression which, when evaluated, determines the eligibility of a customer for an offer. For example, you can set up rules so that an offer is eligible only to customers over the age of 21 years, with a salary of more than $35,000. A *rule set* is a group of eligibility rules that you can apply as a unit.

To specify eligibility rules for an offer

1) Navigate to the Administration - Marketing screen > Decision Center view.
2) Open the Decision Center view for edit operations.

   For information about how to open decision center for edit operations, see *4.14 - Opening Decision Center for Editing for IOG for Siebel Call Center*.
3) In the tree structure in the left pane, select the offer that you want to work with in Decision Process > Marketing Messages.
4) In the right pane, click the Definition tab, then click the Eligibility tab.
5) To add a rule, click the Add Rule toolbar button in the Eligibility tab view.

   For more information about how to add a rule, see *4.15.1-Adding Eligibility Rules*.
6) To add a rule set, click the Add Rule Set toolbar button in the Eligibility tab view.

   For more information about how to add a rule set, see *4.15.1-Adding Eligibility Rules*.
7) Click the Save toolbar button in the Eligibility tab view.

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4.15.1 Adding Eligibility Rules

You can add rules, or groups of rules, to determine the eligibility of customers for an offer.

To add eligibility rules

1) Click the Add Rule toolbar button in the Eligibility tab view.

   A blank rule is displayed.

2) Click the field on the left side of the blank rule, then click the selection button at the right side of the field.

3) Use the Edit value dialog box to select the attribute on which you want to base the rule.

   For example, to base the rule on the age of the customer, select Attribute in the Edit value dialog box, then use the tree structure to locate the customer age attribute in the session attributes tree.

4) Click the equal sign, then click the selection button at the right side of the field. Select an operator from the drop-down menu.

   For example, if the offer applies to customers over the age of 21, select the IS GREATER THAN OR EQUAL TO (>=) operator.

5) Click the field on the right side of the blank rule, then click the selection button at the right side of the field.

6) Use the Edit value dialog box to select the value against which you want to evaluate the attribute.

   For example, if the offer applies to customers over the age of 21, select the Constant option, then select Integer from the Data Type drop-down list. Type 21 in the Value text field.

   For more information about how to work with rules, see the Oracle RTD platform Documentation Library on Oracle Technology Network.

To add sets of eligibility rules

1) Click the Add Rule Set toolbar button in the Eligibility tab view.

2) Click the field on the left side of the blank rule, then click the selection button at the right side of the field.

3) Use the Edit value dialog box to select the attribute on which you want to base the rule.

4) Click the equal sign, then click the selection button at the right side of the field. Select an operator from the drop-down menu.

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5) Click the field on the right side of the blank rule, then click the selection button at the right side of the field.
6) Use the Edit value dialog box to select the value against which you want to evaluate the attribute.

   For more information about how to work with rule sets, see the Oracle RTD platform Documentation Library on Oracle Technology Network.

4.16 Updating Offer Information for Oracle RTD for Siebel Call Center

You can add and update information about each offer. For example, you can add and update a profit margin figure associated with an offer.

To update offer information

1) Navigate to the Administration - Marketing screen > Decision Center view.
2) Open the Decision Center view for edit operations. For information about how to open Decision Center for edit operations, see *4.14 - Opening Decision Center for Editing for IOG for Siebel Call Center*.
3) In the tree structure in the left pane, select the offer you want to work with in Decision Process > Marketing Messages > Intelligent Offers.
4) In the right pane, click the Configuration tab, then click the Attributes tab.
5) Enter the value for the offer attribute in the Value column in the Attributes tab view.
6) Click the Save button at the end of the table of attributes.

4.17 Activating the Offers for Oracle RTD for Siebel Call Center

To make the changes to the offers available in Siebel Call Center, you must first redeploy the modified Inline Service and then optionally promote it.

To redeploy the Inline Service

1) Navigate to the Administration - Marketing screen > Decision Center view.
2) Open the Decision Center view in edit mode. For information about how to open Decision Center in edit mode, see *4.14 - Opening Decision Center for Editing for IOG for Siebel Call Center*.
3) Make changes to the required offers, as described in Process of Setting Up Real-Time Intelligent Offers for Siebel Call Center.
4) Click the Redeploy button.
5) If you want to continue to work with the current Inline Service, select the Keep the current Inline Service opened for editing check box.
6) Click OK.

To promote the Inline Service

1) Navigate to the Administration - Marketing screen > Decision Center view.

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2) Open the Decision Center view in edit mode. For information about how to open Decision Center in edit mode, see *4.14 - Opening Decision Center for Editing for IOG for Siebel Call Center*.
3) Make changes to the required offers, as described in *4.10 - Process of Setting Up Real-Time Intelligent Offers for Siebel Call Center*.
4) Redeploy the Inline Service, with the option to keep the current Inline Service opened for editing selected.
5) Click the Promote button.
6) Select the deployment state to which you want to promote the Inline Service from the To deployment state drop-down list.
7) If you want to continue to work with the current Inline Service, select the Keep the current Inline Service opened for editing check box.
8) Click OK.

4.18 IOG Views for Call Center Agents

IOG Application for Siebel Call Center provides views that expose offer recommendations by Oracle RTD for use by call center agents. The content of these views varies, depending on your business model.

The following table lists the views that call center agents can use.

View	To access, navigate to…
Account Summary (RTD)	Accounts > Accounts List > Account Summary (RTD)
Contact Summary (RTD)	Contacts > Contacts List > Contact Summary (RTD)

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5 Configuring IOG in Siebel Enterprise Server 8.1

For information on how to implement Intelligent Offer Generation with Siebel 8.1, see the chapter “Intelligent Offer Generation Using Oracle Real-Time Decisions for Call Center” in the *Siebel Applications Administration Guide*, version 8.1.

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6 Inbound Offer Management for Siebel Marketing and Oracle RTD

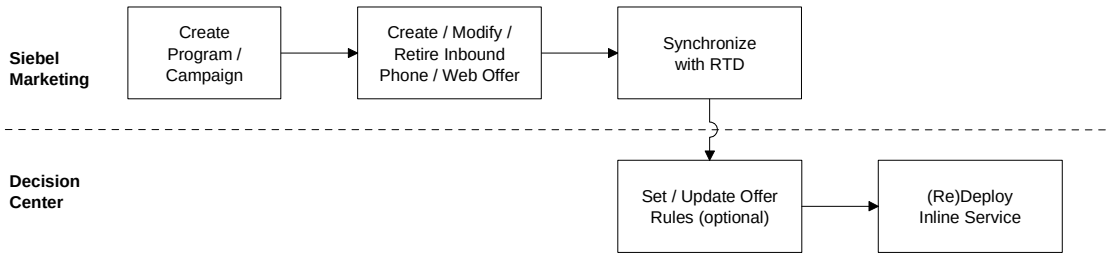
6.1 Overview

Inbound Offer Management for Siebel Marketing and Oracle RTD enables marketers to create and manage offers using Siebel Marketing and deploy these offers for inbound optimization with Oracle RTD. It facilitates the management of both inbound and outbound marketing activities using a single application.

The application enables marketing users to:

1) Create and manage marketing offers and retention treatments in Siebel Marketing, and synchronize these messages for real-time optimization with Oracle RTD server in Siebel Call Center and other customer facing applications.

2) Track drivers of offer response behavior directly through embedded intelligence reports in Siebel Marketing.



Marketing administrators use Oracle RTD Decision Center to define eligibility rules for inbound designated offers and propagate new offers from development to QA and finally to production state.

Note: Changes made to offer attributes on the Oracle RTD side are not synchronized back to Siebel Marketing. The synchronization process is one way only from Siebel Marketing to the Oracle RTD platform.

6.2 Architectural Overview

Siebel Marketing uses EAI web services to communicate with Oracle RTD server and export offer data and metadata to the Oracle RTD platform. Offers are represented on the RTD platform as choices. Select offer attributes are replicated in Oracle RTD as choice attributes.

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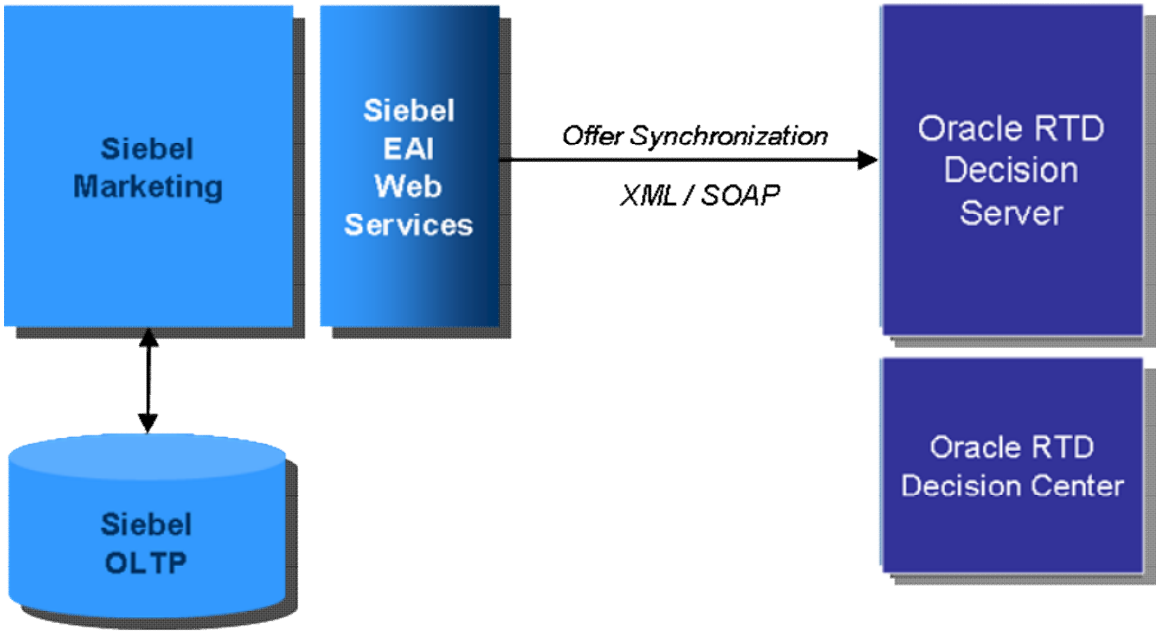

6.3 Installation and Setup

The Inbound Offer Deployment capabilities for Siebel Marketing are installed as part of IOG Core Services in Siebel 7.8 and are built-in in Siebel 8.0 and Siebel 8.1.

6.4 Deployment of Inbound Offers

6.4.1 Creating Inbound Offers

Siebel Marketing provides a complete set of capabilities to manage marketing campaigns from planning and execution to post campaign analysis. Marketers can use Siebel Marketing to create new offers or designate existing offers for inbound interactions. In Siebel Marketing, new or modified offers that are designated for inbound optimization with Oracle RTD are exported to the Oracle RTD platform via web services. These offers are then utilized within either the Siebel B2B or Siebel B2C Inline Service s that is part of the IOG application, and has already been deployed on the Oracle RTD platform.

Both phone and web offers can be designated for inbound optimization with Oracle RTD. For simplicity purposes, the following instructions and explanations use the example of creating phone offers. Creating web offers for inbound optimization with Oracle RTD is analogous to creating phone offers.

To designate a phone offer for inbound optimization, open the Real-Time Details tab in middle of the Phone Offers view. The following screenshot depicts the content of the Real-Time Details tab.

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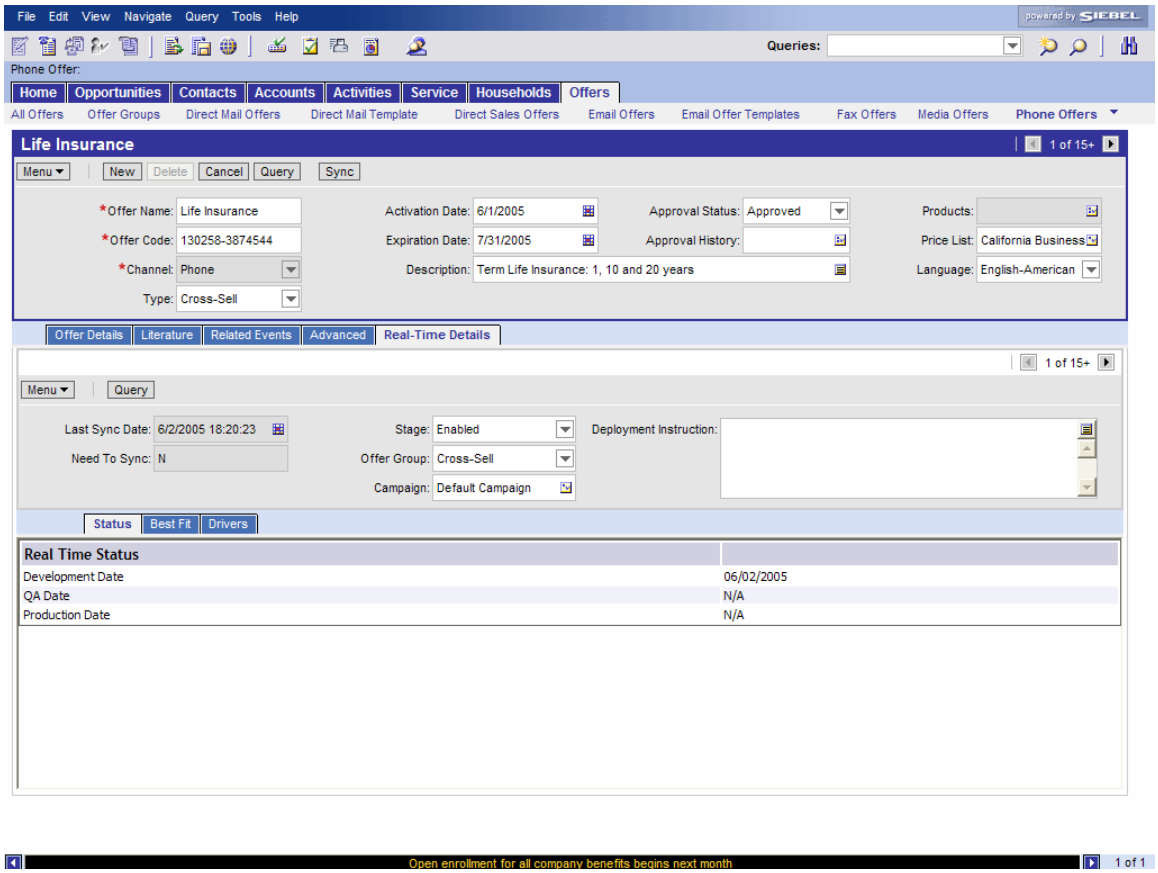

The Real-Time Details tab contains the following information:

Last Sync Date — The date and time of the last synchronization between Siebel Marketing and Oracle RTD.

Need To Sync — Indicates whether or not the offer has changed in Siebel since the last synchronization date, and needs to be synchronized again to Oracle RTD.

Stage — Stage is a required field for synchronization. To enable an offer for deployment with Oracle RTD, set the stage field to **Enabled**. To retire an offer, set the stage field to **Retire**. The default value for this field is **N/A**.

Offer Group — Offer Group is a required field for synchronization. Set the offer group to one the available choices (Acquisition, Awareness, Cross-Sell, and so on). The Offer Group categorizes the offer and enables marketers to define eligibility and scoring rules for groups of offers in Oracle RTD Decision Center.

A special offer group, named **Retention**, designates offers as retention treatments. Only offers in this group are used for recommendations in the Retention Actions applet that comes as part of the IOG solution. All other offers are used for

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recommendations in the Intelligent Offers applet.

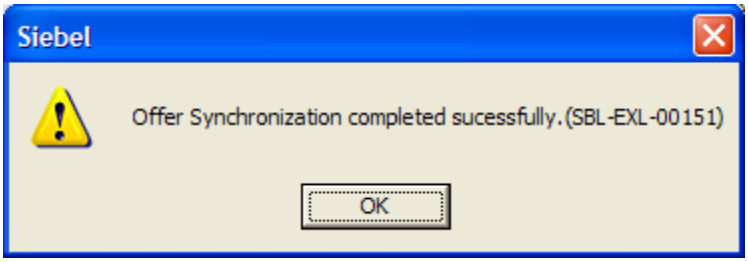
Campaign — Campaign is a required field for synchronization. Every inbound offer needs to be associated to a campaign, for Siebel Call Center to track responses in the Siebel OLTP database. Consult Siebel Bookshelf for information on working with Siebel Marketing to create and manage campaigns.

Deployment Instructions — This text field allows marketers to specify deployment instructions, for example eligibility rule descriptions, that would be shown in Oracle RTD Decision Center. When the offer has been exported, a marketing administrator uses Decision Center to set up the eligibility logic and deploy the new offer based on instructions in this field.

The three additional tabs at the bottom of the Real-Time Details tab provide reporting on the deployment state and learnings of the offer. The content of these tabs are explained in section *6.5 - Reporting on Inbound Offers.*

6.4.2 Exporting Inbound Offers to Oracle RTD

An offer is designated for inbound optimization with Oracle RTD by setting the Stage field to **Enabled**, the offer can now be exported to the Oracle RTD platform by clicking Sync. Depending on hardware and network load, the export operation usually takes a minute to complete. At the end of the export operation the following confirmation message should pop up.



The Sync operation exports the offer to the Oracle RTD platform by creating a corresponding choice under the choice group that was designated by the Offer Group field within the actual Siebel B2B or B2C Inline Service.

6.4.3 Defining Rules for Inbound Offers

Marketing administrators create eligibility rules, set scoring parameters and deploy offers for optimization with Oracle RTD using Oracle RTD Decision Center. When an offer is exported to Oracle RTD, it is available as a choice under the designated offer group. Users can create eligibility both on a group and individual choice level. Group-level rules are inherited by individual group choices.

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Oracle RTD Decision Center is available both embedded in Siebel Marketing and as a stand-alone thin-client application. For more information on creating and managing eligibility rules using Oracle RTD Decision Center, read the *Oracle RTD Decision Center User Guide*.

6.4.4 Promoting Inbound Offers to QA and Production

Marketing administrators use Oracle RTD Decision Center to promote exported offers from Development to QA and finally to Production state. When an offer has been promoted to Production state, the application uses it for real-time learning and recommendations. For more information on promoting offers, read the *Oracle RTD Decision Center User Guide*.

6.4.5 Retiring Inbound Offers

Similar to creating and deploying an offer for inbound optimization, retiring an existing inbound offer requires two main steps using Siebel Marketing and Oracle RTD Decision Center.

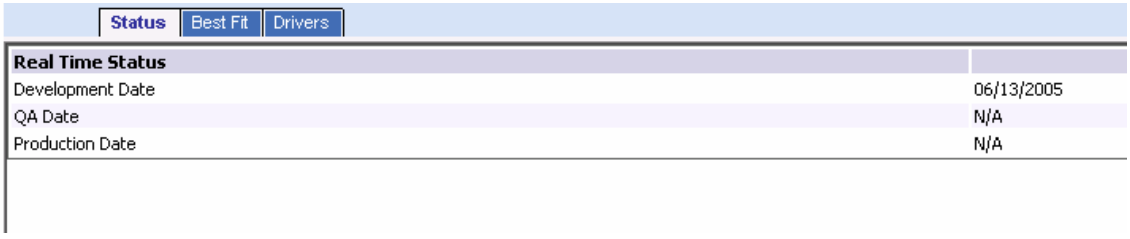
First, to designate an offer for retirement, marketing users need to set the Stage field of an offer to **Retired** and click Sync. The synchronization operation removes the corresponding offer / choice in Development state on the Oracle RTD side.

Next, a marketing administrator promotes the offer removal change to Production, thereby taking the offer out of inbound recommendation and learning process.

6.5 Reporting on Inbound Offers

At the bottom of the Real-Time Details applet, a set of three tabs provides access to RTD status and reporting information of an offer. These reports are also available within Oracle RTD Decision Center for each offer created and have additional navigational and reporting capabilities such as drilldowns and access to previous time periods.

6.5.1 Real-Time Status



The Status tab displays the date and time when the offer was promoted to a specific deployment state. A synchronized offer is initially in Development state. A marketing administrator promotes the offer to QA and finally to Production using Decision Center.

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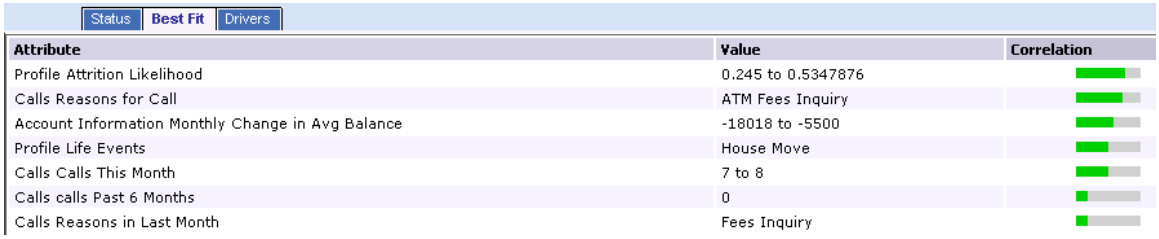
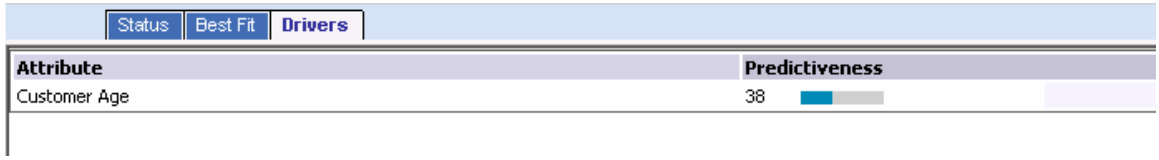
6.5.2 Best Fit Report



The Best Fit tab provides the top customer / account and real-time contextual attribute-value pairs that are highly correlated with the event of a customer / account responding positively to the offer.

6.5.3 Drivers Report



The Drivers tab lists the top customer / account and real-time contextual attributes that have the highest correlation (positive or negative) with the event of a customer / account responding positively to the offer.

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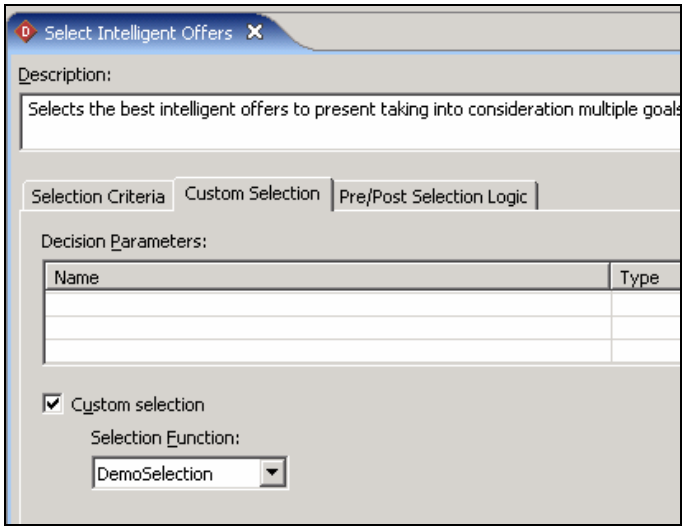
7 Optional Setups

7.1 Setting up Demo Intelligent Cross Sell and Retention Management

The SiebelB2C and SiebelB2B RTD metadata have demo intelligent cross sell and retention management scenarios pre-built, but require a small modification to activate the logic.

1) Open SiebelB2C (or SiebelB2B) in Oracle RTD Decision Studio. Expand the Service Metadata folder, then the Decisions folder, and double-click on the decision Select Intelligent Offers for editing.
2) Make active the Custom Selection tab, check the checkbox labeled Custom selection, and choose **DemoSelection** from the Selection Function dropdown.



3) Save the changes and redeploy the Inline Service.

7.1.1 Single-customer demo tests

For SiebelB2C, the retail banking scenario is as follows:

Scenario Type	Description
Cross Sell	Linda Johnson is a 70 year old conservative customer of Bank X. She has a checking and savings account and banks via traditional check writing and branch teller only. Linda calls the bank and the agent clicks on the phone icon to accept the call. The agent is navigated to the customer dashboard view displaying Linda's profile, financial assets, recent activities, etc. The dashboard also indicates that Linda is currently low churn risk and the best cross sell offer at this time is a *mortgage related offer*. Linda then indicates that she is calling to *order checks*. The agent places the order and creates an activity to log the call reason. With the additional call reason, the

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	dashboard refreshes the best cross sell offers and now recommends a *web bill pay offer*. The agent delivers the offer and Linda's response is tracked to the campaign and offer.
Retention	Robert Knowles is a young 25 year old day trader. Although his brokerage account is with Bank X, he does not have a checking or savings account there. Robert calls the bank and the agent clicks on the phone icon to accept the call. The agent in navigated to the customer dashboard view displaying Robert's profile, financial assets, recent activity etc. The dashboard also indicated that Robert has moderate churn risk and the best cross sell offer at this time is a *Millennium Credit Card offer.* Robert then indicates that he is calling *to inquire about his recent trading fees*. The agent explains the fees and creates an activity to log the call reason. With the additional call reason, the dashboard updates to indicate that Robert has become high churn risk and a retention action is necessary. The agent offers a *Free One Time Fees Waiver* and Robert's response is tracked to the campaign and offer.

For SiebelB2B, the telecommunications scenario is as follows:

Scenario Type	Description
Cross Sell	Pat Weathers is a real estate who is constantly on the go when making mobile calls. He has an average usage of 1400+ minutes a month. Pat calls the telecom company and the agent clicks on the phone icon to accept the call. The agent is navigated to the customer dashboard view displaying Pat's profile, service items, billing items, recent activities, etc. The dashboard also indicates that Pat is currently low churn risk and the best cross sell offer at this time is a *50% Off Hands Free Cell Kit offer*. Pat then indicates that he is calling to *Order an SMS Plan*. Before the agent places the order, he creates an activity to log the call reason. With the additional call reason, the dashboard refreshes the best cross sell offers and now recommends an *Upgrade to Blackberry 7230 Unlimited Internet offer*. The agent delivers the offer and Pat's response is tracked to the campaign and offer.
Retention	Shirley Roberts is a consultant who runs a home based business. She's a Gold customer in terms of profitability partly due to her Very High monthly cell phone bills. Due to recent network repairs, she has experienced a spike in dropped calls the last 30 days. Shirley calls the telecom company and the agent clicks on the phone icon to accept the call. The agent is navigated to the customer dashboard view displaying Shirley's profile, service items, billing items, recent activities, etc. The dashboard also indicates that Shirley has moderate churn risk and the best cross sell offer at this time is a *One Month Trial DSL Program offer.* Shirley then indicates that she is calling *to complain about recent dropped calls*. The agent explains that the reason for dropped calls was due to recent network repairs and creates an activity to log the call reason. With the additional call reason, the dashboard updates to indicate that Shirley has become high churn risk and a retention action is necessary. The agent offers a *200 Minute Credit on Dropped Calls* and Shirley's response is tracked to the campaign and offer.

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The SiebelB2C and SiebelB2B metadata have been configured to demo the above scenarios by 1) checking for the demo customers and hard coding the cross sell and retention scenarios and 2) providing a GenerateLearnings entry point for bulk generating customer interactions that train the Oracle RTD learning models.

7.1.2 Bulk customers demo tests

In order to bulk generate the customer interactions, both SiebelB2C and SiebelB2B provide corresponding load generator scripts to invoke the GenerateLearnings advisor with 10,000 unique customer ids Each call of the script does the following:

1. Generate Learnings advisor integration point is invoked by load generator with unique customer id.
2. A new session is started.
3. The *Session Started* event is logged on the *Churn Indicator Event* choice.
4. Customer or Account entity is filled with demo data.
5. A random eligible choice under intelligent offers choice group is selected.
6. The *Presented* event is logged on the selected offer.
7. *IsInterested* is called to check if customer is interested in selected offer.
8. If so, the *Interested* event is logged on the selected offer.
9. IsAttrite is called to check if the customer would churn.
10. Is so, the *Churn Indicated* event is logged on the *Churn Indicator Event* choice.
11. End session on exiting the integration point and commit the learnings.

In order to run the script, perform the following:

1) Start the Oracle RTD Load Generator utility by double-clicking on the loadgen.cmd script in *RTD_HOME*\scripts\loadgen.cmd, where *RTD_HOME* is where you had unzipped the Oracle RTD install (ex: C:\OracleBI\RTD\scripts\loadgen.cmd).

2) From Load Generator, open the SiebelB2C_LoadGenerator.xml or SiebelB2B_LoadGenerator.xml script provided in the Oracle RTD Applications media pack directory depending on the Siebel Enterprise Server version and the application type (B2B or B2C), for example:

   \software\Oracle Real-Time Decisions for Siebel Intelligent Offer Generation\Siebel7.8\B2C\SiebelB2B_LoadGenerator.xml

3) Go to the *General* tab and select the clientHttpEndPoints.properties file in the clients folder of the Oracle RTD installation (ex: C:\OracleBI\RTD\clients\). You may need to first edit this file if the Oracle RTD server is on a different machine than the load generator such as the case when Oracle RTD server is on UNIX.

4) Review the setup in the Variable and Edit Script tab. The customer or account id should be a sequence of integers with 1. The script should only invoke the Generate Learnings integration point.

5) Start the script from the Run tab and let it run 10,000 requests. Verify that the load generator is contacting the intended server and also check for exceptions in the RT server log. If there are exceptions you need to troubleshoot the script.

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6) Open the Oracle RTD Decision Center UI and log into the latest deployment state of SiebelB2C or SiebelB2B when prompted. Verify that counts and analysis are being displayed for intelligent offer choices and the churn indicator event choice. The drivers and best-fit reports should model the scenarios described above.

7.2 Utilizing analytics data via OLAP tables

Follow the instructions in this section to enable the use of Siebel Analytics / Oracle BI data as part of the decision logic in the IOG Inline Services SiebelB2B and SiebelB2C. The sequence is as follows:

1) Create and populate OLAP tables for history entities
2) Configure OLAP data source
3) Modify IOG Inline Services to include the history attributes

7.2.1 Create and populate the OLAP Tables for History Entities

Siebel Analytics Server / Oracle BI provides behavioral and aggregate metrics that are sourced by Oracle RTD to enrich the customer profile for learning. Siebel Analytics Server / Oracle BI needs to stage the behavioral metrics in a custom OLAP table so that Oracle RTD can access the table using standard DB2, Oracle, SQL Server or Teradata drivers. Siebel Analytics Server / Oracle BI does not support connectivity from a JDBC interface directly. The following steps assume that Analytics Server has already been installed and is running a Siebel 7.5.x, 7.7.x or 7.8.x RPD against the Siebel RMW. If you are using Oracle BI 10.1.3.2-10.1.3.4, these instructions will still work, please substitute Siebel Analytics paths with Oracle BI paths.

1) Using a command window, go to siebelanalytics/bin folder and run nQCmd.exe. Enter the ODBC DSN and administrative username password to connect to the Siebel Analytics Server. Select option [Q]:

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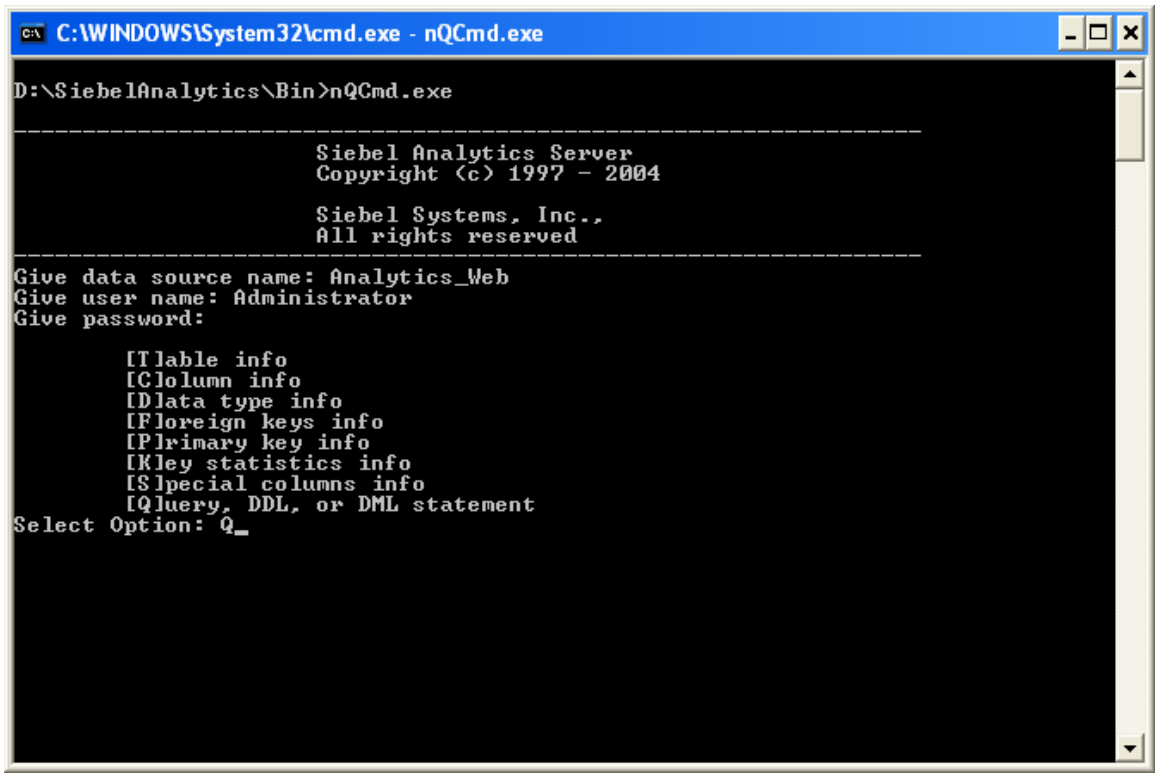

2) In another window, navigate to the Inline Service specific analytics server query file. This file can be found in the Oracle RTD Applications media pack, in the directory (for example, for Siebel 7.8 and Siebel B2C):

   \software\Oracle Real-Time Decisions for Siebel Intelligent Offer Generation\Siebel7.8\B2C\SQL_ANALYTICS_SERVER.txt

3) For each of the POPULATE statements in the file, execute the statement into the nQCmd.exe window. As an example, the statement will retrieve the result set as specified in the logical SQL and insert into the RTD_SRVREQ_HISTORY table through the **Data Warehouse Connection Pool**. The below table lists all the statements:

Service	Entity	OLAP Table	Description
SiebelB2C SiebelB2B	Service Request History	RTD_SRVREQ_HIST	Average Service Quality, # of Critical SRs, Average SR Duration, # of Open SRs
SiebelB2C SiebelB2B	Order History	RTD_ORDER_HIST	% Change Quarter Ago Total Order Revenue, # of Orders

Here an example run of the Service Request History populate statement:

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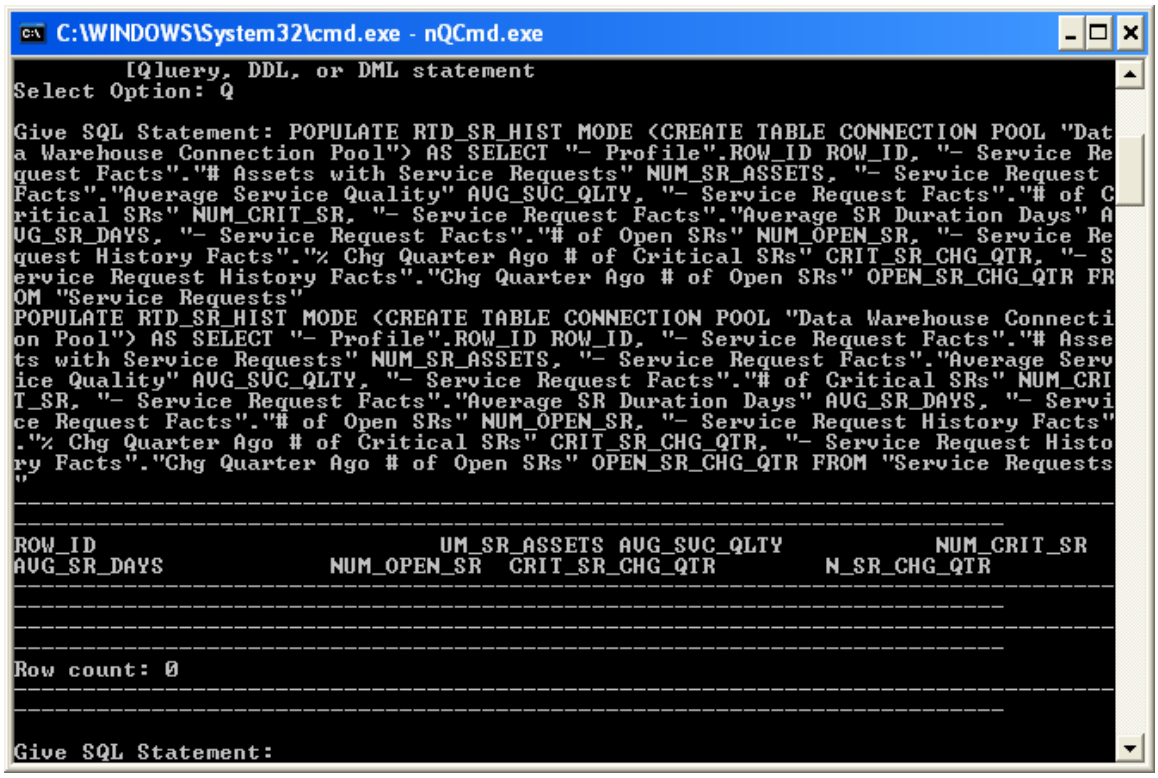

4) Once the tables have been created, connect to the SIEBEL_OLAP DSN using any SQL tool and verify that the RTD_* tables exist and contain data.

7.2.2 Configure OLAP data source

The following JDBC data source is required in order to utilize analytics data generated in section *7.2.1- Create and populate the OLAP Tables for History Entities*:

Data Source Name	Type	Description
SIEBEL_OLAP	Source	Used to fill the service request and order history entities using pre-populate OLAP tables.

To create the **SIEBEL_OLAP** data source in the application server and RTD resource references to it, refer to the Oracle RTD platform document *Installation and Administration of Oracle RTD*, with section numbers as specified by the following table.

Application server	Section #	Notes
Oracle AS 10.1.3	Section 7.1	In section 7.1.2, steps 11a and 11b: set the data source and JNDI names to **SIEBEL_OLAP**
IBM WebSphere 6.1	Section 7.2	In section 7.2.1, steps 13b and 13c: set the data source and JNDI names to **SIEBEL_OLAP**
BEA WebLogic 9.2	Section 7.3	In section 7.3.2, steps 4a and 4b: set the data source and JNDI names to **SIEBEL_OLAP**

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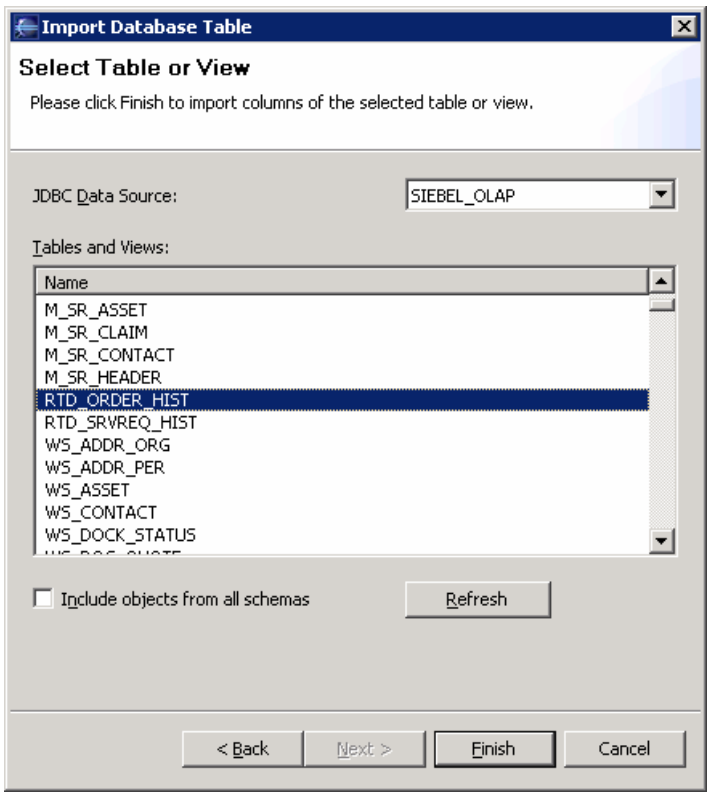
7.2.3 Test the OLAP data source

After you have created the SIEBEL_OLAP data source as described above, verify that the SIEBEL_OLAP data source is accessible by the Oracle RTD server. Start Oracle RTD Decision Studio and make sure SiebelB2B or SiebelB2C is shown in the Inline Service Explorer. For more information on setting up an IOG inline service, see section *2.7-Deploying the Siebel IOG Inline Service to the Oracle RTD Server*.

1) Expand the data sources folder and double click on Order History, and then click Import.
2) Select the running Oracle RTD server and click Next. If the SIEBEL_OLAP data source was configured correctly, the application displays a list of tables and views with the correct view highlighted for the current data source as shown below:



If you get an error message instead, then double check the JDBC data source configuration as described earlier. Click Cancel since there is no need to re-import the data source.

7.2.4 Modify IOG Inline Services to include the history attributes

Once you have created the SIEBEL_OLAP data source as described above, several modifications to the IOG Inline Service (SiebelB2B or SiebelB2C) are needed. To make changes to the IOG Inline Service, start Oracle RTD Decision Studio and make sure SiebelB2B or SiebelB2C is shown in the Inline Service Explorer.

1) Expand the Entities folder and double click on Session.

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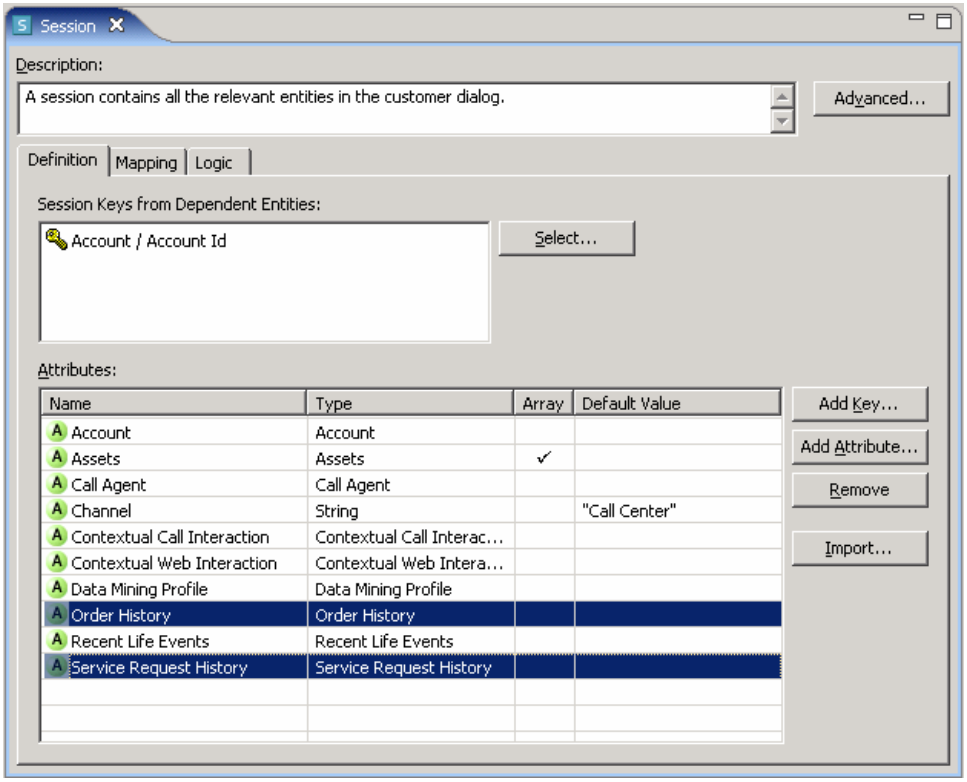
2) In the Definition tab, click on the button Add Attribute and set the Display Label to **Order History**. The ID will automatically be set to **orderHistory**. In the Data Type dropdown, select **Other**. In the dialog box that pops up, expand the folder Entity Types and select **Order History**. Click OK twice.

3) Add another attribute by clicking on the Add Attribute button. Set Display Label to **Service Request History**. The ID will automatically be set to **serviceRequestHistory**. For the Data Type, select entity type of **Service Request History**. Click OK twice. The list of Session attributes should now look like the following:



4) Expand the Functions folder and double click on LogInfo. In the Logic section, uncomment the line that prints the number of open service requests:

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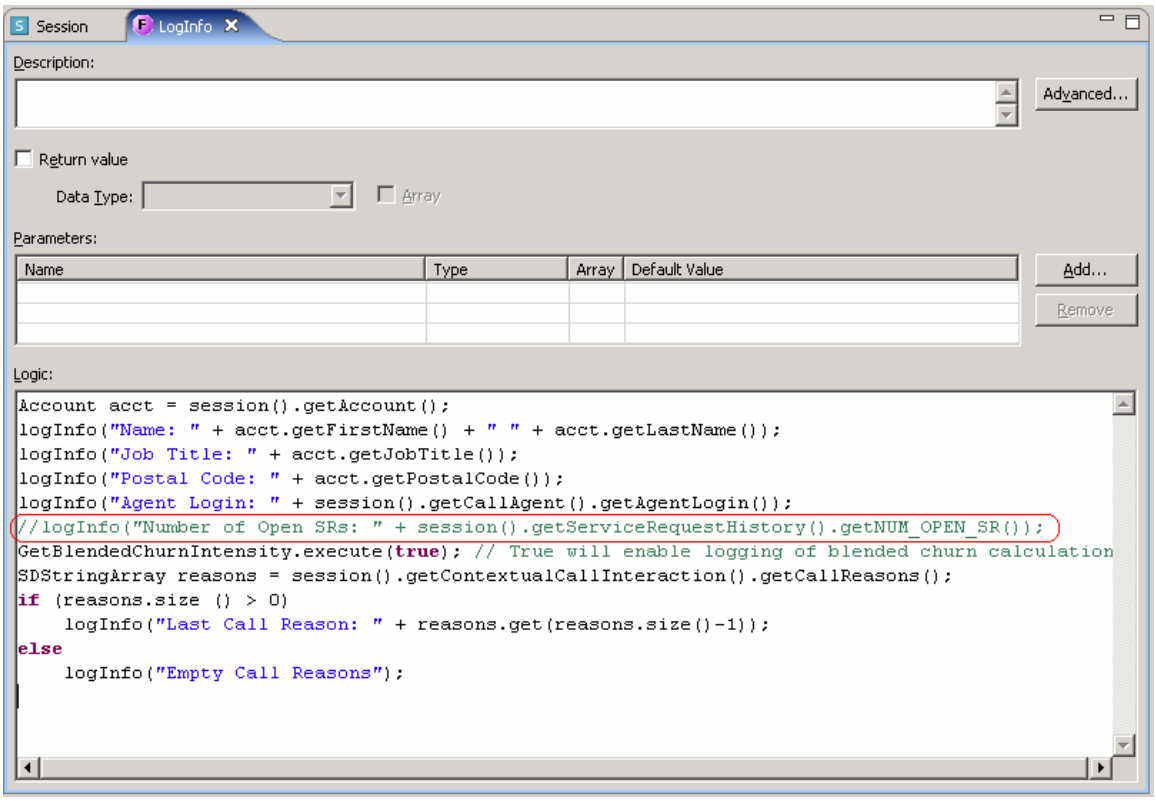

5) Save all changes (Ctrl-Shift-S).

6) Redeploy the Inline Service.

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8 Appendix

Note: Appendixes A and B are for IOG implementations with Siebel 7.8 only, and are used in the scenarios described in section *7.1 - Setting up Demo Intelligent Cross Sell and Retention Management*.

8.1 Appendix A: Creating List of Values for Call Reason.

Call Reason data in the Activity List Applet is passed to the Oracle RTD server along with Call Reason informant call when activity record of type Call-Inbound is saved. Additional logic can be built on Oracle RTD server metadata based on Customer call reason.

Follow these steps for creating Call Reasons LOVs:

1) Go to site map > Administration - Data > List Of Values
2) Create following LOVs based on the deployed Inline Service:

For SiebelB2C, the suggested LOVs for the Financial Services based demo scenarios described in section 7.1 are:

Type	Display Value	Language Independent Code	Language Name	Parent LIC	Order	Active	Translate
TODO_TYPE	Change of Address	Change of Address	English-American	Call - Inbound	200	Y	Y
TODO_TYPE	Check Balance	Check Balance	English-American	Call - Inbound	201	Y	Y
TODO_TYPE	Check Payment	Check Payment	English-American	Call - Inbound	202	Y	Y
TODO_TYPE	Fees Inquiry	Fees Inquiry	English-American	Call - Inbound	203	Y	Y
TODO_TYPE	Order Checks	Order Checks	English-American	Call - Inbound	204	Y	Y

Note: The demo scenarios require the Fees Inquiry and Order Checks call reasons.

For SiebelB2B. the suggested LOVs for the Telecommunications based demo scenarios described in section 7.1 are:

Type	Display Value	Language Independent Code	Language Name	Parent LIC	Order	Active	Translate
TODO_TYPE	Upgrade SMS Plan	Upgrade SMS Plan	English-American	Call - Inbound	200	Y	Y
TODO_TYPE	Upgrade Voice Plan	Upgrade Voice Plan	English-American	Call - Inbound	201	Y	Y
TODO_TYPE	Complaint – Dropped Calls	Complaint – Dropped Calls	English-American	Call - Inbound	202	Y	Y

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TODO_TYPE	Fees Inquiry	Fees Inquiry	English-American	Call - Inbound	203	Y	Y
TODO_TYPE	Disconnect	Disconnect	English-American	Call - Inbound	204	Y	Y
TODO_TYPE	Update Profile	Update Profile	English-American	Call - Inbound	205	Y	Y

Note: The demo scenarios require the Upgrade SMS Plan and Complaint – Dropped Calls call reasons.

8.2 Appendix B: List of Siebel Repository Changes.

Following is the list of Siebel Repository Objects that are updated or created during Core sif import, for example, CORE_HOR_SiebelRTD.sif or CORE_SIA_SiebelRTD.sif.

Object Type	Name	Project	New	Comments
Applet	Phone Offer Detail Form Applet	Offer (DBM)	N	Offer Sync button on existing applet.
Applet	Web Offer Detail Form Applet	eMarketing	N	Offer Sync button on existing applet.
Applet	RTD Offer Status Form Applet (Phone Offer)	RTD Integration	Y	New RTD details applet for Phone offer
Applet	RTD Offer Status Form Applet (Web Offer)	RTD Integration	Y	New RTD details applet for Web offer
Applet	SSO RTD Attrite Profile Applet	RTD Integration	Y	New SSO Applet for Attrite Profile report.
Applet	SSO RTD Cross Sell Offers Applet	RTD Integration	Y	New SSO Applet for Cross sell offers report
Applet	SSO RTD Decision Center Applet	RTD Integration	Y	New SSO Applet for Decision Center
Applet	SSO RTD Decision Center Eligiblity Rules Applet (Phone Offer)	RTD Integration	Y	New SSO Applet for Phone offer Eligibility Rules report.
Applet	SSO RTD Decision Center Eligiblity Rules Applet (Web Offer)	RTD Integration	Y	New SSO Applet for Web offer Eligibility Rules report.
Applet	SSO RTD Decision Center Ideal Profile Applet (Phone Offer)	RTD Integration	Y	New SSO Applet for Phone offer Ideal Profile report.
Applet	SSO RTD Decision Center Ideal Profile Applet (Web Offer)	RTD Integration	Y	New SSO Applet for Web offer Ideal Profile report.
Applet	SSO RTD Decision Center Offer Status Applet (Phone Offer)	RTD Integration	Y	New SSO Applet for Phone offer status report.
Applet	SSO RTD Decision Center Offer Status Applet (Web Offer)	RTD Integration	Y	New SSO Applet for Web offer status report.
Applet	SSO RTD Decision Cetner Influential Factors Applet (Phone Offer)	RTD Integration	Y	New SSO Applet for Phone offer Influential factors report.
Applet	SSO RTD Decision Cetner Influential Factors Applet (Web Offer)	RTD Integration	Y	New SSO Applet for Web offer Influential factors report.
BusComp	Offer	Offer (DBM)	N	Added new RTD fields to existing Offer BusComp.
BusComp	Phone Offer	Offer (DBM)	N	Added new RTD fields to existing Phone Offer BusComp.
BusComp	Web Offer	eMarketing	N	Added new RTD fields to existing Web Offer BusComp.
BusComp	RTD SSO	RTD Integration	Y	New SSO BusComp for RTD report Symbolic URLs

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BusObject	Offer	Offer (DBM)	N	Added SSO buscomp to existing Offer Bus Object.
BusService	ExternalChoice	RTD Integration	Y	New Outbound Web Service Dispatcher Business service (Offer Sync)
BusService	SDClientPortType	RTD Integration	Y	New Outbound Web Service Dispatcher Business service (Informant / Advisor)
BusService	RTD SOAP Interface Service	RTD Integration	Y	New Business Service for Offer Sync / Informant / Advisor Web Services.
BusService	RTD Integration Service	RTD Integration	Y	New Business Service to handle Advisor Virtual BusComps / Run-Time events / Communication Events
Int Object	externalChoiceOperation	RTD Integration	Y	New Integration Object for Offer Sync Web Service
Int Object	ExternalChoiceResult	RTD Integration	Y	New Integration Object for Offer Sync Web Service
Int Object	cc	RTD Integration	Y	New Integration Object for Informant / Advisor Web Service
Int Object	defs	RTD Integration	Y	New Integration Object for Informant / Advisor Web Service
Int Object	dvs	RTD Integration	Y	New Integration Object for Informant / Advisor Web Service
Int Object	ea	RTD Integration	Y	New Integration Object for Informant / Advisor Web Service
Int Object	is	RTD Integration	Y	New Integration Object for Informant / Advisor Web Service
Int Object	req	RTD Integration	Y	New Integration Object for Informant / Advisor Web Service
Int Object	res	RTD Integration	Y	New Integration Object for Informant / Advisor Web Service
Int Object	st	RTD Integration	Y	New Integration Object for Informant / Advisor Web Service
Picklist	RTD Offer Group Picklist	RTD Integration	Y	New picklist for RTD Choice Groups
Picklist	RTD Offer Status Picklist	RTD Integration	Y	New picklist for RTD Offer Status
Screen	Marketing Administration Screen	SME Campaign Management	N	Added 3 news SSO reports to existing screen
Screen	Offer Screen	Offer (DBM)	N	Added 3 new Offer reports each for Phone & Web Offers
Table	S_DMND_CRTN_PRG	Table Marketing	N	Schema changes to existing offer table to store new RTD attributes
View	SSO RTD Attrite Profile View	RTD Integration	Y	New SSO View for Attrite Profile report.
View	SSO RTD Cross Sell Offers View	RTD Integration	Y	New SSO View for Cross sell offers report
View	SSO RTD Decision Center View	RTD Integration	Y	New SSO View for Decision Center
View	SSO RTD Eligibility Rules View (Phone Offer)	RTD Integration	Y	New SSO View for Phone offer Eligibility Rules report.
View	SSO RTD Eligibility Rules View (Web Offer)	RTD Integration	Y	New SSO View for Web offer Eligibility Rules report.
View	SSO RTD Ideal Profile View (Phone Offer)	RTD Integration	Y	New SSO View for Phone offer Ideal Profile report.
View	SSO RTD Ideal Profile View (Web Offer)	RTD Integration	Y	New SSO View for Web offer Ideal Profile report.
View	SSO RTD Influential Factors View	RTD Integration	Y	New SSO View for Phone offer Influential

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	(Phone Offer)			factors report.
View	SSO RTD Influential Factors View (Web Offer)	RTD Integration	Y	New SSO Applet for Web offer Influential factors report.
View	SSO RTD Offer Status View (Phone Offer)	RTD Integration	Y	New SSO View for Phone offer status report.
View	SSO RTD Offer Status View (Web Offer)	RTD Integration	Y	New SSO View for Web offer status report.

Following is the list of Siebel Repository Objects that are updated or created during B2C sif import, for example, B2C_HOR_SiebelRTD.sif or B2C_SIA_SiebelRTD.sif.

Object Type	Name	Project	New	Comments
Applet	Contact Activity List Applet (RTD)	RTD Integration	Y	New Activity list applet with column for Call Reason.
Applet	RTD Intelligent Offers List Applet (B2C)	RTD Integration	Y	New List applet to show results of Get Intelligent Offers Advisor call.
Applet	RTD Retention Actions Form Applet (B2C)	RTD Integration	Y	New List applet to show results of Get Retention Action Advisor call.
Bitmap	Churn Bar	RTD Integration	Y	New Bitmap to show Churn Indicator Bar Graphic
Bitmap	Likelihood Intensity	RTD Integration	Y	New Bitmap to show Offer Score (Stars) Graphic
BusComp	Action	Activity	N	Added new Field for 'Sub Type' (Note: This field already existed in SIA repository. So this BusComp is not included in SIA sif file)
BusComp	RTD Intelligent Offers (B2C)	RTD Integration	Y	New virtual BusComp to store output of Get Intelligent Offers Advisor call.
BusComp	RTD Retention Actions (B2C)	RTD Integration	Y	New virtual BusComp to store output of Get Retention Action Advisor call.
BusObject	Contact	Contact	N	Added RTD virtual Buscomps to existing Contact BusObject.
Icon Map	Churn Bar	RTD Integration	Y	New Icon Map to show Churn Indicator Bar Graphic
Icon Map	Likelihood Intensity	RTD Integration	Y	New Icon Map to show Offer Score (Stars) Graphic
Link	Contact/RTD Intelligent Offers (B2C)	RTD Integration	Y	New Link
Link	Contact/RTD Retention Actions (B2C)	RTD Integration	Y	New Link
PickList	RTD Call Reason Type	RTD Integration	Y	New Picklist for Call Reasons (TODO_TYPE) Note: This picklist is not included in SIA sif file)
Screen	Contacts Screen	Contact (SSE)	N	Added new Contact Summary view to existing Screen
View	Contact Summary View (RTD)	RTD Integration	Y	New Contact Summary view containing RTD Offers applets.

Following is the list of Siebel Repository Objects that are updated or created during B2B sif import, for example, B2B_HOR_SiebelRTD.sif or B2B_SIA_SiebelRTD.sif.

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Object Type	Name	Project	New	Comments
Applet	Account Activity List Applet (RTD)	RTD Integration	Y	New Activity list applet with column for Call Reason.
Applet	RTD Intelligent Offers List Applet (B2B)	RTD Integration	Y	New List applet to show results of Get Intelligent Offers Advisor call.
Applet	RTD Retention Actions Form Applet (B2B)	RTD Integration	Y	New List applet to show results of Get Retention Action Advisor call.
Bitmap	Churn Bar	RTD Integration	Y	New Bitmap to show Churn Indicator Bar Graphic
Bitmap	Likelihood Intensity	RTD Integration	Y	New Bitmap to show Offer Score (Stars) Graphic
BusComp	Action	Activity	N	Added new Field for 'Sub Type' (Note: This field already existed in SIA repository. So this BusComp is not included in SIA sif file)
BusComp	RTD Intelligent Offers (B2B)	RTD Integration	Y	New virtual BusComp to store output of Get Intelligent Offers Advisor call.
BusComp	RTD Retention Actions (B2B)	RTD Integration	Y	New virtual BusComp to store output of Get Retention Action Advisor call.
BusObject	Account	Account	N	Added RTD virtual Buscomps to existing Account BusObject.
Icon Map	Churn Bar	RTD Integration	Y	New Icon Map to show Churn Indicator Bar Graphic
Icon Map	Likelihood Intensity	RTD Integration	Y	New Icon Map to show Offer Score (Stars) Graphic
Link	Account/RTD Intelligent Offers (B2B)	RTD Integration	Y	New Link
Link	Account/RTD Retention Actions (B2B)	RTD Integration	Y	New Link
PickList	RTD Call Reason Type	RTD Integration	Y	New Picklist for Call Reasons (TODO_TYPE) Note: This picklist is not included in SIA sif file)
Screen	Accounts Screen	Account (SSE)	N	Added new Contact Summary view to existing Screen
View	Customer Account Portal View (RTD)	RTD Integration	Y	New Account Deshboard view containing RTD Offers applets.

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